



**PO230**

**Last Revised: June 27, 2013**

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## **PO230**

### **PO230 Creating and Managing Requisitions in Purchasing**

#### **Course Overview**

In GEARS, requisitions are entered in the eProcurement and the Purchasing modules. The AOC Procurement and Contractor Administration Office (AOC Procurement) enters and manages requisitions using the Purchasing module.

Prior to the creation of a requisition, you can view the available funds in the budget you plan to use on your requisition to ensure that there are sufficient funds available to commit to a purchase.

The *PO230 Creating and Managing Requisitions in Purchasing* addresses entering, updating and inquiring on requisitions entered in Purchasing for goods and services and is intended for AOC Procurement Buyers.

#### **Course Outline**

The following lessons provide step-by-step instructions on entering, updating, and inquiring on commitments in GEARS and understanding the concepts associated with purchasing goods and services for the Judiciary.

- Course Audiences and Prerequisites
- Lesson 1: Creating Requisitions in Purchasing
- Lesson 2: Managing Requisitions
- Lesson 3: Inquiring on Requisition Information
- Course Summary

### **Course Audience and Prerequisites**

#### **Audience(s)**

The Judiciary audiences for this course are:

- AOC Procurement and Contract Admin

#### **GEARS Role(s)**

This course is intended for Judiciary employees with the following GEARS role(s):

- Procurement Buyer

#### **Prerequisites**

The recommended prerequisites for this course are:

- INT100 Introduction to GEARS
- PO100 Understanding GEARS Procurement Processes

## Understanding the Requisition Document Structure

In GEARS, there are four levels in the transactional hierarchy of a requisition:

- Header
- Line
- Schedule
- Distribution

The four levels in the hierarchy contain the important information that defines the transaction (i.e., who, what, when, where, and how much). Purchase orders use the same hierarchy.

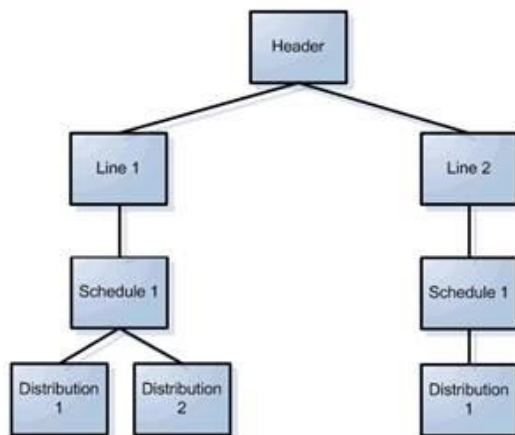
After completing this section, you will be familiar with the sections of a requisition and be able to identify where the following information is located on a requisition:

- the requisition vendor, amount, status and other identifying information
- line information (for what you are reserving funds)
- the funding source(s) of a requisition (i.e., the PCA, Account (sub-object) and other Chartfield accounting distribution to be used to record the transaction in the budget and general ledger)

The example below illustrates the transaction hierarchy. In this example, there is one header, two lines, two schedules and three distributions for the transaction.

The GEARS system allows a single line on a requisition to be associated with more than one scheduled delivery. This functionality is unlikely to be used on a frequent basis at the Judiciary but it is important to understand how it works. In a similar manner, the charges on a single line on a requisition can be shared across several distributions. For example, two departments who plan to share a printer could each absorb half of the purchase cost of the printer.

Multiple schedules and multiple distributions can be very useful under the right set of circumstances but these features may not be used very frequently at the Judiciary.



### Header

Headers contain high-level information about the transaction. This information applies to the entire transaction and is “inherited” by the attached line(s), schedule(s), and distribution(s). Below are other attributes of the header of a transaction:

- There is only one header per transaction
- For commitments, header information includes the:
  - *Requester: user requesting the good or service*
  - *Req Date: date requisition created*
  - *Req ID: number assigned to the requisition*
  - *Accounting Date: date recorded in the GEARS General Ledger for the transaction*
  - *Status: status of the requisition (e.g., open, approved, canceled, completed)*

### Line

For requisitions, line-level information includes the goods or services being requested, how many goods or services are being requested, how much the good or service costs, what the calculated dollar amount of the goods or services is (based on the selected unit of measure).

Below are other attributes of the line of a transaction:

- Headers may have one or more lines. In the illustration above, there are two lines. A transaction could potentially have an unlimited number of lines.
- There must be at least one line per header
- The line contains item or service level information about the header
- A line can be an "amount only" if it will be invoiced by amount rather than by quantity. Lines for services or flat amounts are generally "amount only" lines. Exceptions may include services that are billed by the hour, day, week, etc.

The line contains the following major fields:

- *Item ID:* Item ID assigned to a good/service
- *Description:* Description of the good or service
- *Unit of Measure (UOM):* used to quantify or track resources (e.g., EA – Each)
- *Quantity:* quantity to be obligated; lines for services or flat amounts will have a quantity of "1".
- *Price:* unit price or cost of a service
- *Category:* type of good or service
- *Status:* status of the requisition line (e.g., open, approved, canceled)

### Schedule

In GEARS, schedule-level information identifies the due date of a purchase and the Judiciary shipping location or location where a service will be performed. Each line must have a corresponding Schedule. The line must have a minimum of one schedule. The illustration above shows only one schedule per line.

The GEARS System allows a single PO line to have multiple delivery schedules. For example, a PO line for 10 each could have 5 each scheduled for delivery on 12-1-2013 and 5 each scheduled for delivery on 1-1-2014. This functionality may not be used often at AOC.

The schedule contains the following major fields:

- *Due Date:* Item ID assigned in the Item Master associated with a good/service
- *Ship To:* The value used to indicate where goods are to be shipped or where a service will be received

### **Distribution**

The distribution of a transaction contains accounting (funding source) information about the line and schedule. The distribution is where Chartfield information defines how the cost of the purchase will be expensed, whether the expense is done by quantity or amount, and what percent of the quantity or amount to expense. Other attributes of the distribution are:

- A distribution can be split by amount or quantity. In the illustration above, Line 1 on the transaction has two distributions.

The fields on the distribution include:

- *Distribute by:* quantity or amount, the methods to allocate the expense. **NOTE:** Requisitions for services or flat costs are generally distributed by "Amount."
- *Percent:* percentage of either the quantity or amount to be distributed or allocated to a funding source entered (depending on the "Distribute by" method selected)
- *Chartfield:* accounting codes used to identify the funding source for the transaction
- *Entry Event:* codes used to define the accounting entries for the transaction
- *Status:* status of the distribution line (e.g., open, canceled, closed)

## Lesson 1: Creating Requisitions in Purchasing

### **Lesson Overview**

A requisition is required when a good or service is to be acquired from a vendor. Requisitions are entered by AOC Procurement using the Purchasing module.

### **Lesson Objectives**

After completing this lesson, you will be able to:

- Verify funds availability in Commitment Control
- Create a requisition for a catalog item
- Use default options on a requisition

### **1.1 Verifying Funds Availability**

You may need to investigate a budget error or view available funds for a specific budget. You can use the **Budget Detail** inquiry pages to view the details of a specific budget. **NOTE:** Only authorized users can view the **Budget Detail** inquiry page.

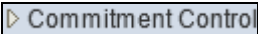


After completing this topic, you will be able to:

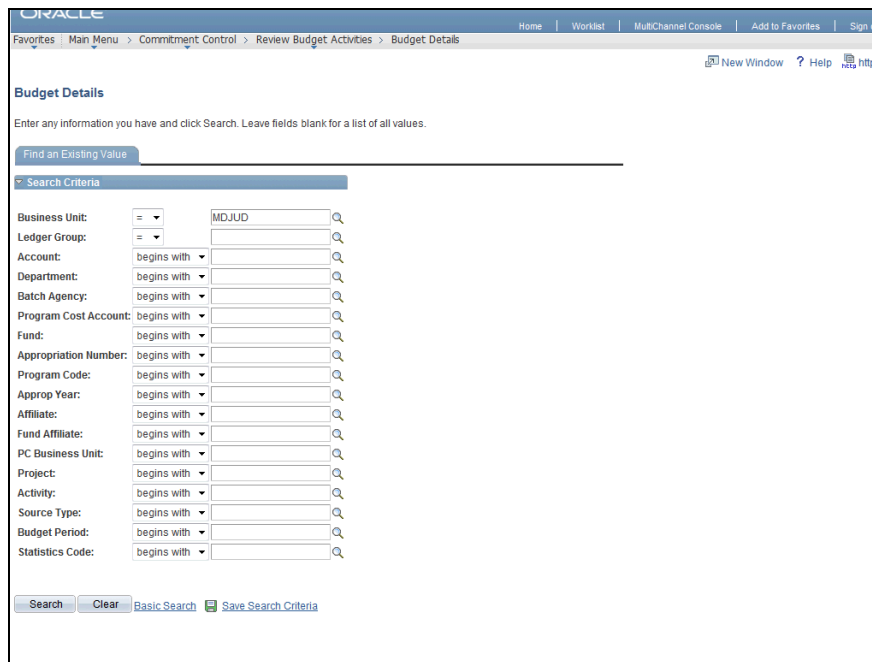
- search for a specific budget using the **Budget Details** search page

- view available funds for a specific account (sub-object class)

## Procedure

In this topic, you will learn how to use the **Budget Detail** inquiry pages to perform a funds availability check.

Step	Action
1.	Scroll down to the <b>Commitment Control</b> link.
2.	Click the <b>Commitment Control</b> link. 
3.	Click the <b>Review Budget Activities</b> link. 
4.	Click the <b>Budget Details</b> link. 



ORACLE  
Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

Favorites | Main Menu | Commitment Control > Review Budget Activities > Budget Details

New Window ? Help http

**Budget Details**

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Search Criteria

Business Unit: MDJUD

Ledger Group:

Account: begins with

Department: begins with

Batch Agency: begins with

Program Cost Account: begins with

Fund: begins with

Appropriation Number: begins with

Program Code: begins with

Approp Year: begins with

Affiliate: begins with

Fund Affiliate: begins with

PC Business Unit: begins with

Project: begins with

Activity: begins with


Source Type: begins with

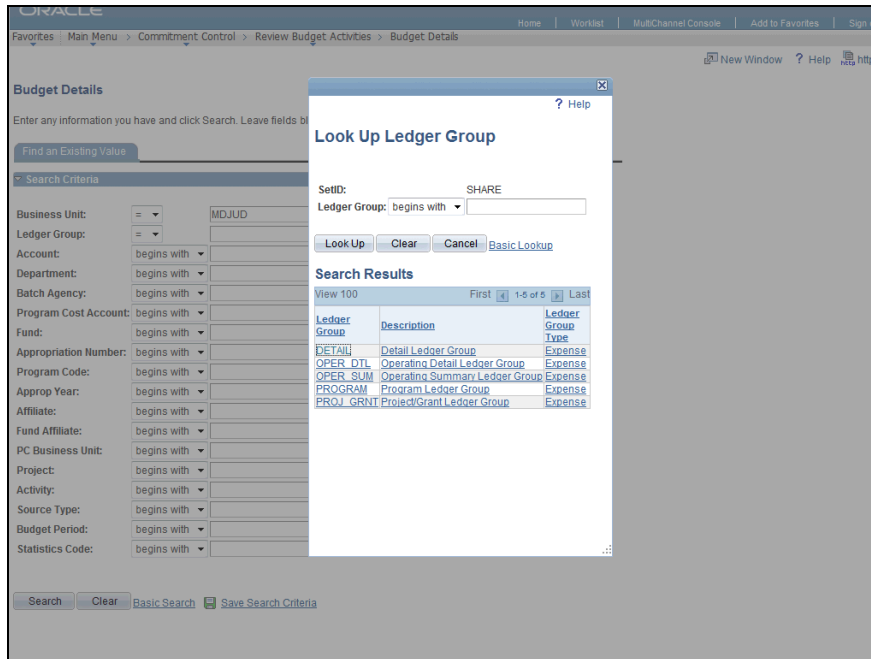
Budget Period: begins with

Statistics Code: begins with

Search Clear Basic Search Save Search Criteria

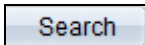
Step	Action
5.	The <b>Budget Details - Find an Existing Value</b> page displays.  Use this page to enter criteria and search for the budget you want to view.

Step	Action
6.	<p>Make sure that the <b>Business Unit</b> field has "MDJUD". If it does not, enter it in the field.</p> <p>Click the <b>Look up Ledger Group</b> button.</p> 

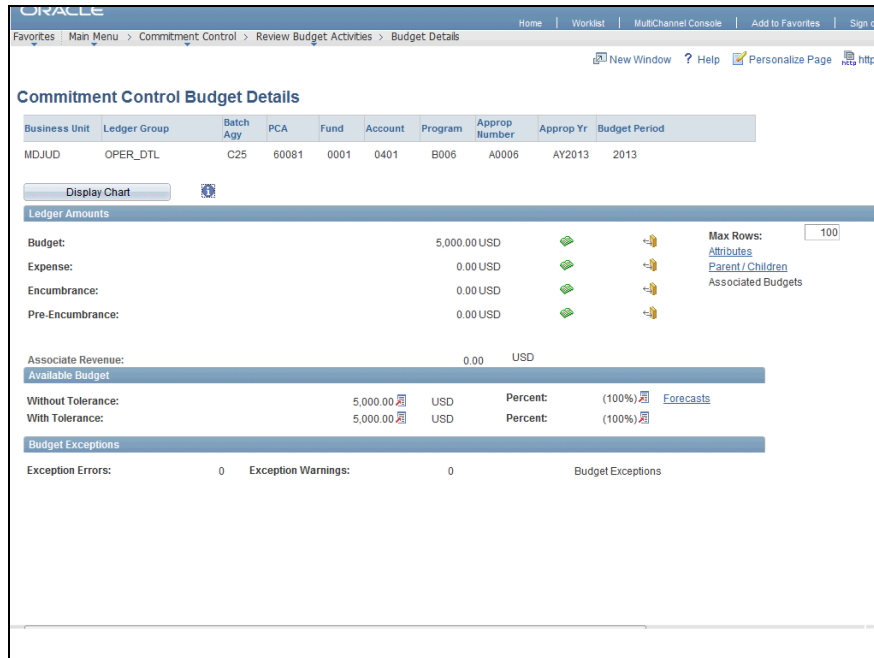


The screenshot shows the 'Look Up Ledger Group' dialog box. The 'SetID' is 'SHARE'. The 'Ledger Group' is set to 'begins with'. The 'Search Results' table lists the following ledger groups:

Ledger Group	Description	Ledger Group Type
DETAIL	Detail Ledger Group	Expense
OPER_DTL	Operating Detail Ledger Group	Expense
OPER_SUM	Operating Summary Ledger Group	Expense
PROGRAM	Program Ledger Group	Expense
PROJ_GRNT	Project/Grant Ledger Group	Expense

Step	Action
7.	<p>The <b>Look Up Ledger Group</b> page displays.</p> <p>Use this page to search for the desired ledger group.</p>
8.	<p>Click the <b>OPER_DTL</b> link.</p> <p><u><a href="#">OPER_DTL</a></u></p>
9.	<p>Enter the applicable Chartfields for the budget you want to view.</p> <p>For example, enter the <b>Batch Agency</b>, <b>Account</b> (sub-object), <b>Program Cost Account</b>, and <b>Fund</b>.</p>
10.	<p>Click the <b>Search</b> button.</p> <p></p>





Step	Action
11.	<p>The <b>Commitment Control Budget Details</b> page displays for the budget specified.</p> <p>The available balance to spend displays in the <b>Available Budget</b> section at the bottom of the page.</p>
12.	<p>You have successfully completed the <i>Verifying Funds Availability</i> topic.</p> <p>You have learned to:</p> <ul style="list-style-type: none"> <li>- Use the Budget Details search page to find a budget</li> <li>- View the available funds for a budget</li> </ul> <p><b>End of Procedure.</b></p>

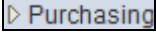


## 1.2 Creating Requisition for a Catalog Item

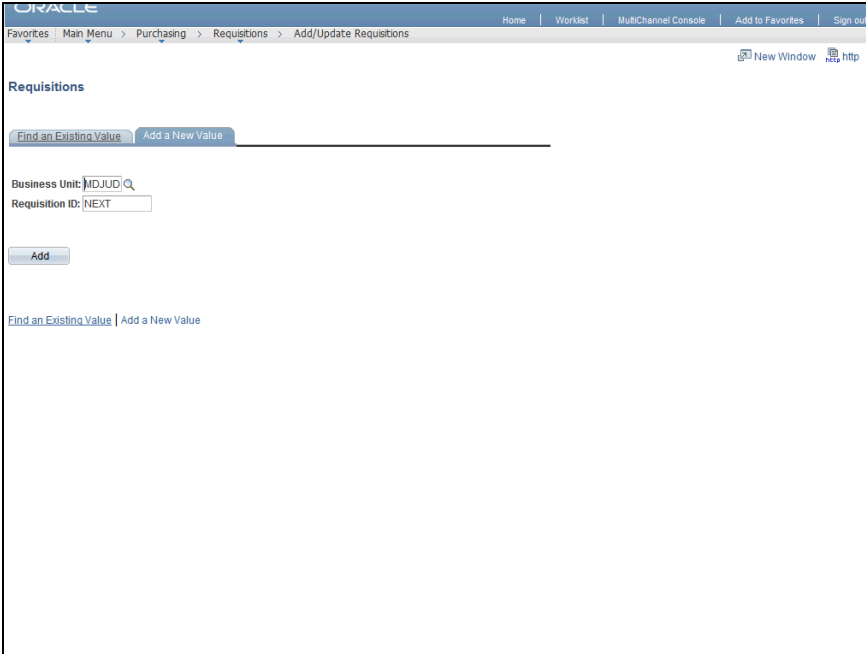
After completing this topic, you will be able to:

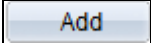
- Create a requisition from catalog with multiple lines

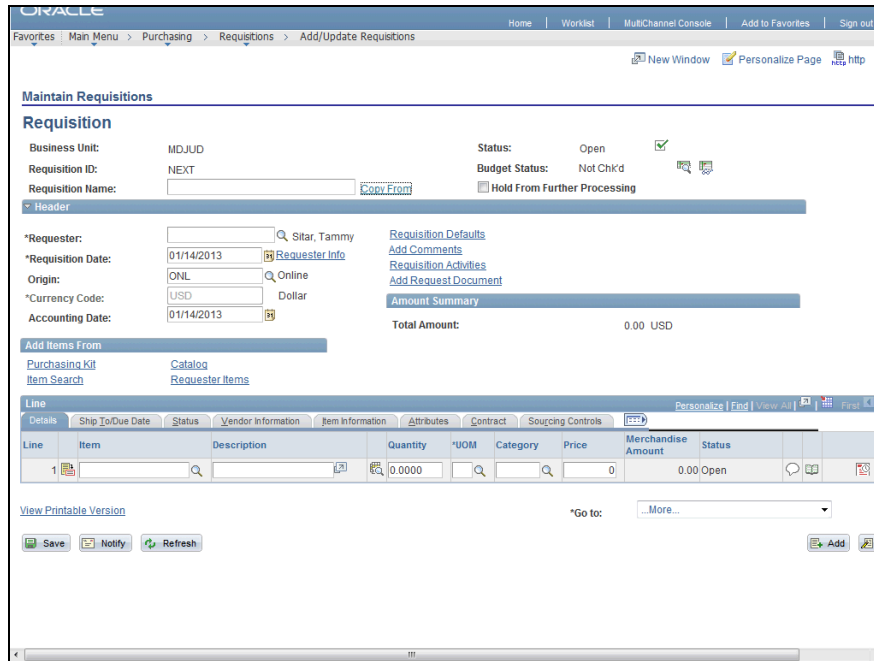
### Procedure

In this topic, you will create a requisition using an Item catalog.

Step	Action
1.	Navigate to the <b>Requisitions</b> page.  Click the <b>Purchasing</b> link. 
2.	Click the <b>Requisitions</b> link. 
3.	Click the <b>Add/Update Requisitions</b> link. 



Step	Action
4.	The <b>Requisitions</b> search page displays.  Verify that the Business Unit and Requisition ID fields are populated correctly.  Click the <b>Add</b> button. 



Oracle  
 Home | Worklist | MultiChannel Console | Add to Favorites | Sign out  
 Favorites | Main Menu > Purchasing > Requisitions > Add/Update Requisitions  
 New Window | Personalize Page | http

**Maintain Requisitions**  
**Requisition**  
 Business Unit: MDJUD Status: Open  
 Requisition ID: NEXT Budget Status: Not Chk'd  
 Requisition Name:  [Copy From](#) ☐ Hold From Further Processing

**Header**  
 \*Requester:  Sitar, Tammy [Requisition Defaults](#)  
 \*Requisition Date: 01/14/2013 [Add Comments](#)  
 Origin: ONL [Requisition Activities](#)  
 \*Currency Code: USD Dollar [Add Request Document](#)  
 Accounting Date: 01/14/2013 [Amount Summary](#)  
 Total Amount: 0.00 USD

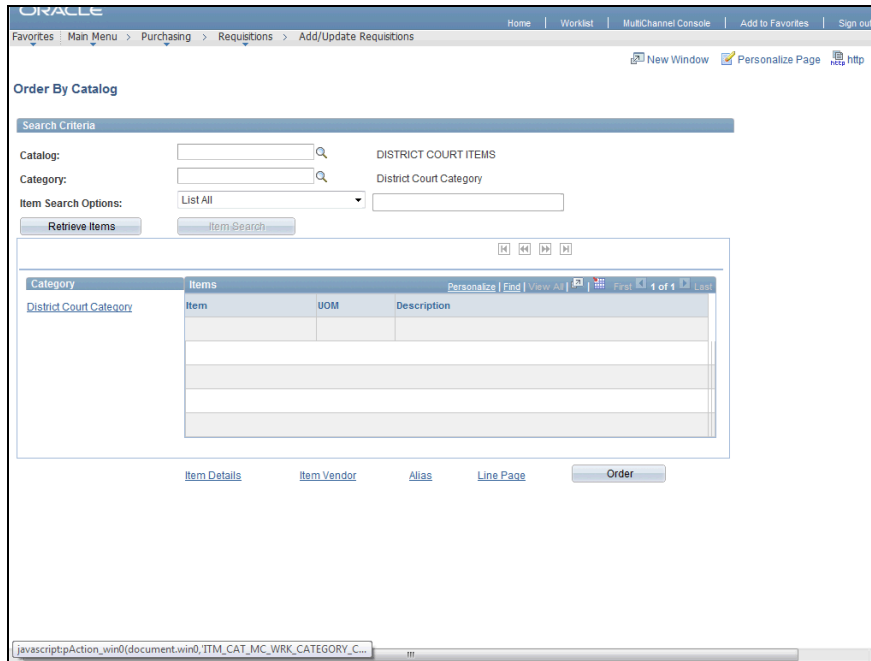
Add Items From:  
 Purchasing Kit Catalog  
 Item Search Requester Items

**Line**  
 Details | Ship To/Due Date | Status | Vendor Information | Item Information | Attributes | Contract | Sourcing Controls  

Line	Item	Description	Quantity	UOM	Category	Price	Merchandise Amount	Status
1			0.0000				0.00	Open

View Printable Version \*Go to:  More...  
 Save | Notify | Refresh | Add

Step	Action
5.	The <b>Requisition - Maintain Requisitions</b> page displays.  Enter a valid value e.g. " <b>PTP.2.1.3</b> " into the <b>Requisition Name</b> field.
6.	Enter the desired information into the <b>Requester</b> field. Enter a valid value e.g. " <b>tammy.sitar</b> ".
7.	Click the <b>Catalog</b> link. <a href="#">Catalog</a>



Oracle  
Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

Favorites | Main Menu > Purchasing > Requisitions > Add/Update Requisitions

Order By Catalog

Search Criteria

Catalog:  DISTRICT COURT ITEMS

Category:  District Court Category

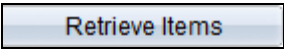
Item Search Options: List All

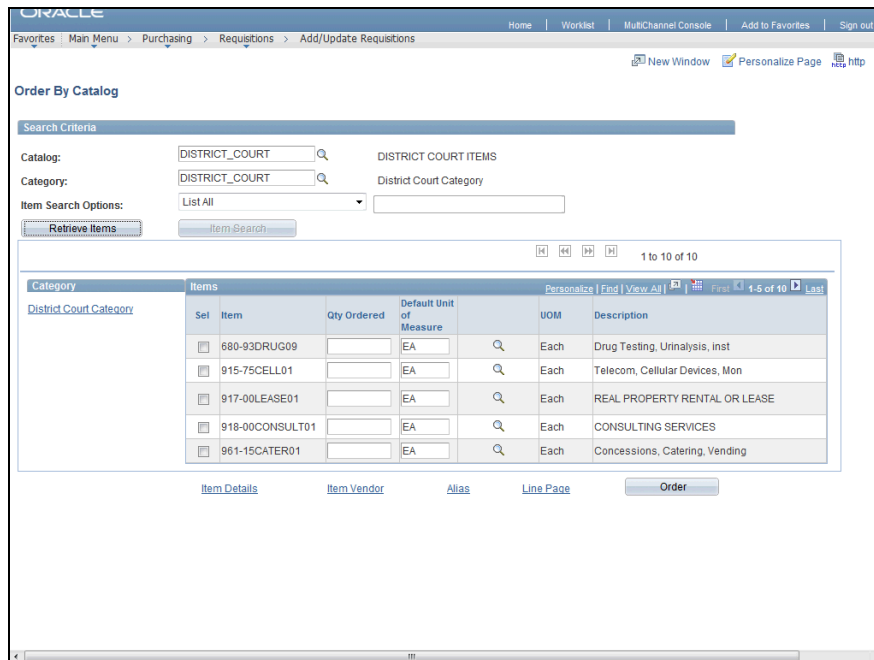
[Retrieve Items](#) [Item Search](#)

Category	Item	UOM	Description
District Court Category			

[Item Details](#) [Item Vendor](#) [Alias](#) [Line Page](#) [Order](#)

javascript:Action\_win0(document.win0.TTM\_CAT\_MC\_WRK\_CATEGORY\_C...

Step	Action
8.	The <b>Order by Catalog</b> page displays.  Enter the desired information into the <b>Catalog</b> field. Enter a valid value e.g. " <b>DISTRICT_COURT</b> ".
9.	Enter the desired information into the <b>Category</b> field. Enter a valid value e.g. " <b>DISTRICT_COURT</b> ".
10.	Click the <b>Retrieve Items</b> button. 



Oracle  
 Home | Worklist | MultiChannel Console | Add to Favorites | Sign out  
 Favorites | Main Menu > Purchasing > Requisitions > Add/Update Requisitions  
 New Window | Personalize Page | http

**Order By Catalog**


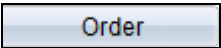
**Search Criteria**

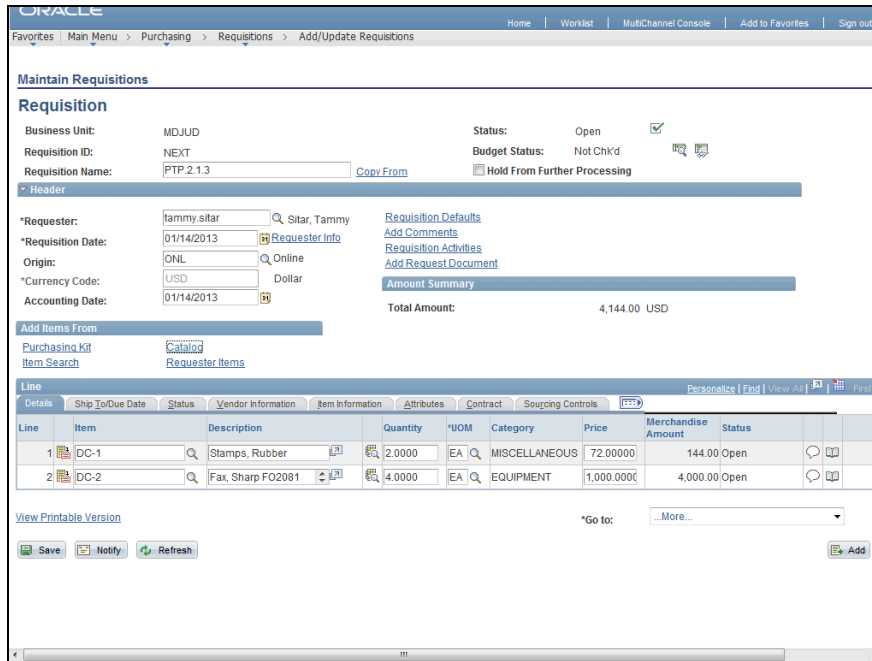
Catalog:  DISTRICT COURT ITEMS  
 Category:  District Court Category  
 Item Search Options:   
 Retrieve Items | Item Search

1 to 10 of 10

Category	Items	Personalize	Find	View All	First	1-5 of 10	Last																																			
District Court Category	<table border="1"> <thead> <tr> <th>Sel</th> <th>Item</th> <th>Qty Ordered</th> <th>Default Unit of Measure</th> <th>UOM</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td><input checked="" type="checkbox"/></td> <td>680-93DRUG09</td> <td><input type="text"/></td> <td>EA</td> <td>Each</td> <td>Drug Testing, Urinalysis, Inst</td> </tr> <tr> <td><input checked="" type="checkbox"/></td> <td>915-75CELL01</td> <td><input type="text"/></td> <td>EA</td> <td>Each</td> <td>Telecom, Cellular Devices, Mon</td> </tr> <tr> <td><input checked="" type="checkbox"/></td> <td>917-00LEASE01</td> <td><input type="text"/></td> <td>EA</td> <td>Each</td> <td>REAL PROPERTY RENTAL OR LEASE</td> </tr> <tr> <td><input checked="" type="checkbox"/></td> <td>918-00CONSULT01</td> <td><input type="text"/></td> <td>EA</td> <td>Each</td> <td>CONSULTING SERVICES</td> </tr> <tr> <td><input checked="" type="checkbox"/></td> <td>961-15CATER01</td> <td><input type="text"/></td> <td>EA</td> <td>Each</td> <td>Concessions, Catering, Vending</td> </tr> </tbody> </table>	Sel	Item	Qty Ordered	Default Unit of Measure	UOM	Description	<input checked="" type="checkbox"/>	680-93DRUG09	<input type="text"/>	EA	Each	Drug Testing, Urinalysis, Inst	<input checked="" type="checkbox"/>	915-75CELL01	<input type="text"/>	EA	Each	Telecom, Cellular Devices, Mon	<input checked="" type="checkbox"/>	917-00LEASE01	<input type="text"/>	EA	Each	REAL PROPERTY RENTAL OR LEASE	<input checked="" type="checkbox"/>	918-00CONSULT01	<input type="text"/>	EA	Each	CONSULTING SERVICES	<input checked="" type="checkbox"/>	961-15CATER01	<input type="text"/>	EA	Each	Concessions, Catering, Vending					
Sel	Item	Qty Ordered	Default Unit of Measure	UOM	Description																																					
<input checked="" type="checkbox"/>	680-93DRUG09	<input type="text"/>	EA	Each	Drug Testing, Urinalysis, Inst																																					
<input checked="" type="checkbox"/>	915-75CELL01	<input type="text"/>	EA	Each	Telecom, Cellular Devices, Mon																																					
<input checked="" type="checkbox"/>	917-00LEASE01	<input type="text"/>	EA	Each	REAL PROPERTY RENTAL OR LEASE																																					
<input checked="" type="checkbox"/>	918-00CONSULT01	<input type="text"/>	EA	Each	CONSULTING SERVICES																																					
<input checked="" type="checkbox"/>	961-15CATER01	<input type="text"/>	EA	Each	Concessions, Catering, Vending																																					

Item Details | Item Vendor | Alias | Line Page | Order

Step	Action
11.	Click the <b>View All</b> link. 
12.	Enter the desired information into the <b>Qty Ordered</b> field. Enter a valid value e.g. "2".
13.	Enter the desired information into the <b>Qty Ordered</b> field. Enter a valid value e.g. "4".
14.	Verify that the <b>Sel</b> Checkbox is checked for both items.  Click the <b>Order</b> button to order the line items you have selected. 



**Oracle**  
Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

Favorites | Main Menu | Purchasing | Requisitions | Add/Update Requisitions

### Maintain Requisitions

#### Requisition

Business Unit: MDJUD Status: Open  
 Requisition ID: NEXT Budget Status: Not Chk'd  
 Requisition Name: PTP 2.1.3 Copy From Hold From Further Processing

**Header**

\*Requester: tammy.sitar Sitar, Tammy  
 \*Requisition Date: 01/14/2013  
 Origin: ONL  
 \*Currency Code: USD Dollar  
 Accounting Date: 01/14/2013

Requisition Defaults  
 Add Comments  
 Requisition Activities  
 Add Request Document  
 Amount Summary

Total Amount: 4,144.00 USD

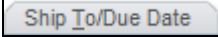
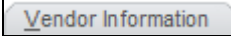
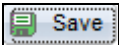
Add Items From  
 Purchasing Kit  
 Item Search

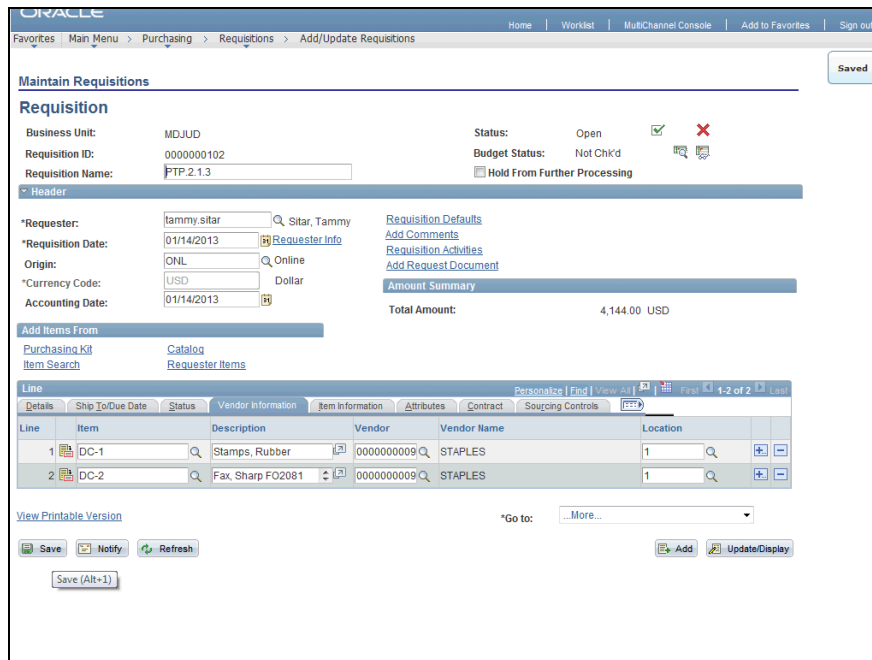
**Line**

Line	Item	Description	Quantity	UOM	Category	Price	Merchandise Amount	Status
1	DC-1	Stamps, Rubber	2.0000	EA	MISCELLANEOUS	72.00000	144.00	Open
2	DC-2	Fax, Sharp FO2081	4.0000	EA	EQUIPMENT	1,000.0000	4,000.00	Open

View Printable Version \*Go to: More...

Save Notify Refresh Add

Step	Action
15.	The <b>Requisition</b> page displays.  Click the <b>Ship To/Due Date</b> tab. 
16.	Enter the desired information into the <b>Due Date</b> field. Enter a valid value e.g. " <b>2/28/2013</b> ".
17.	Enter the desired information into the <b>Due Date</b> field. Enter a valid value e.g. " <b>2/28/2013</b> ".  The date entered should be in the future.
18.	Enter the desired information into the <b>Ship To</b> field. Enter a valid value e.g. " <b>02</b> " for line 1 (if not already defaulted).
19.	Enter the desired information into the <b>Ship To</b> field. Enter a valid value e.g. " <b>02</b> " for line 2 (if not already defaulted).
20.	Click the <b>Vendor Information</b> tab. 
21.	Enter the desired information into the <b>Vendor</b> field. Enter a valid value e.g. " <b>0000000009</b> ", (Staples) for line 2.
22.	Click the <b>Save</b> button. 



**Maintain Requisitions**

**Requisition**

Business Unit: MDJUD Status: Open

Requisition ID: 0000000102 Budget Status: Not Chk'd

Requisition Name: FTP 2.1.3 Hold From Further Processing

**Header**

\*Requester: tammy.sitar Sitar, Tammy

\*Requisition Date: 01/14/2013

Origin: ONL

\*Currency Code: USD Dollar

Accounting Date: 01/14/2013

**Requisition Defaults**

Add Comments

Requisition Activities

Add Request Document

**Amount Summary**

Total Amount: 4,144.00 USD

**Add Items From**

Purchasing Kit Catalog

Item Search Requisition Items

Line	Item	Description	Vendor	Vendor Name	Location
1	DC-1	Stamps, Rubber	0000000009	STAPLES	1
2	DC-2	Fax, Sharp FO2081	0000000009	STAPLES	1

View Printable Version

\*Go to: More...

Save Notify Refresh Add Update/Display

Save (Alt+1)

Step	Action
23.	<p>You have successfully completed the <i>Creating Requisition for a Catalog Item - multiple line items</i> topic.</p> <p>You have learned how to:</p> <ul style="list-style-type: none"> <li>- Enter a requisition for multiple line items.</li> </ul> <p><b>End of Procedure.</b></p>

### 1.3 Applying Requisitions Defaults to a Requisition

In GEARS, you can enter line, schedule, and distribution (accounting) information on multiple lines of a requisition at one time when the same information is needed on each line. For example, if you needed to use the same **PCA** and **Account** for all lines on a requisition, you only have to enter it once.



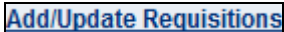
Defaults for the requisition line, schedule, and distribution (accounting) are entered on the **Requisition Defaults** page. **NOTE:** You must enter at least one line on the requisition before applying defaults.

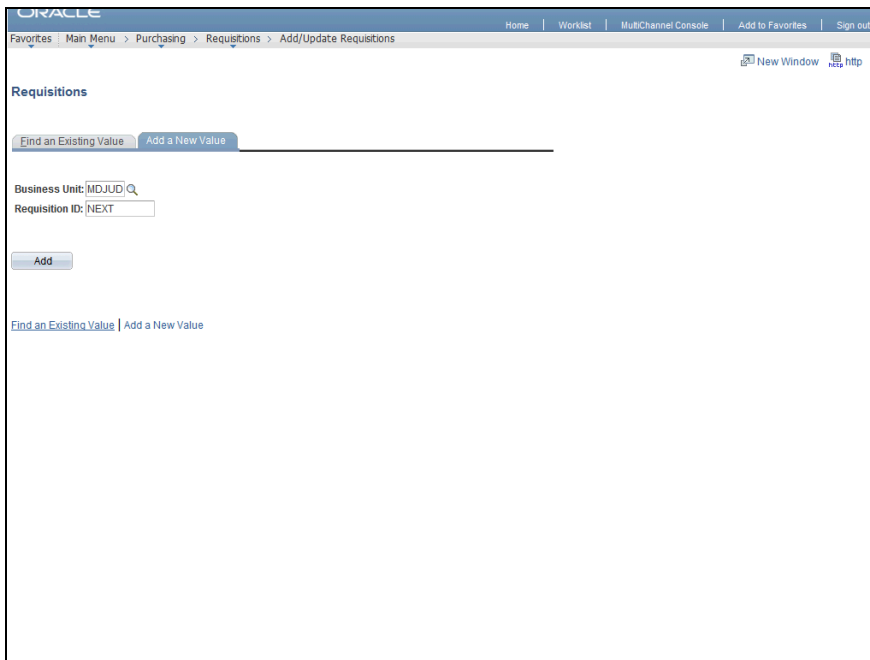
After completing this topic, you will be able to:

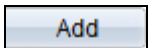
- Use the requisition Defaults page to apply requisition defaults to a requisition

#### Procedure

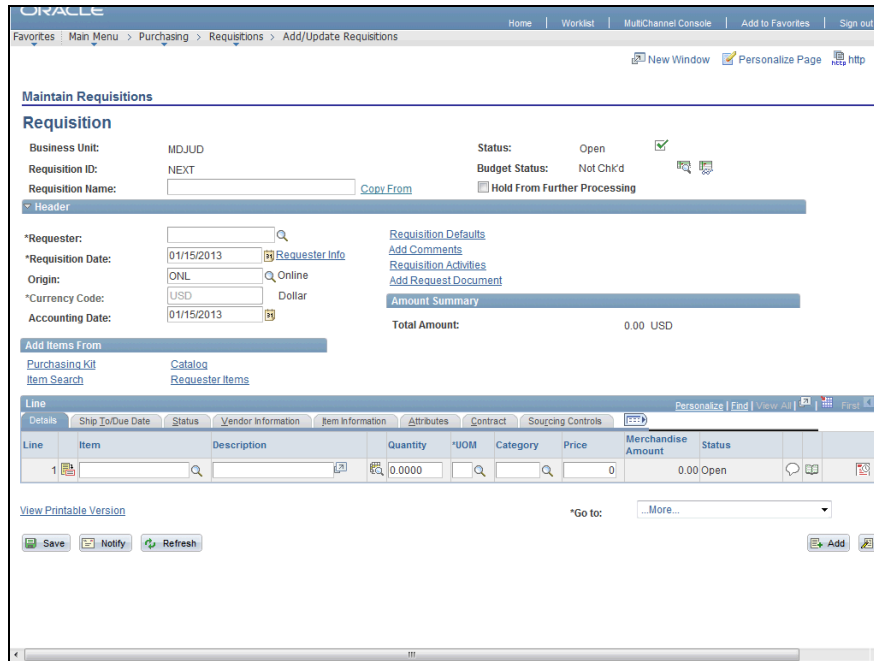
In this topic, you will apply requisition defaults to a requisition.


Step	Action
1.	Navigate to the <b>Requisitions</b> page.  Click the <b>Purchasing</b> link. 
2.	Click the <b>Requisitions</b> link. 
3.	Click the <b>Add/Update Requisitions</b> link. 

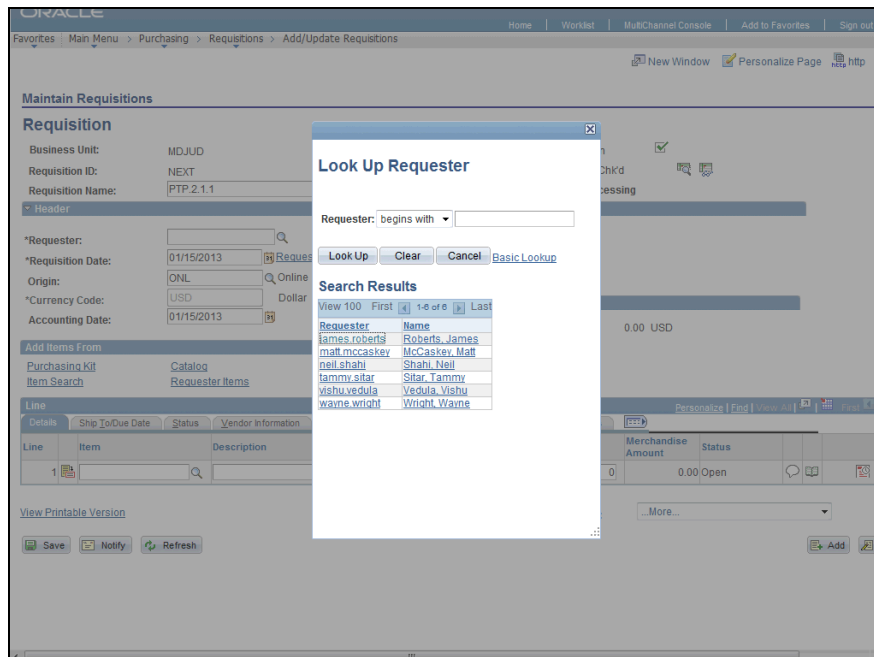



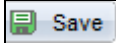
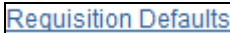
Step	Action
4.	The <b>Requisitions</b> search page displays.  Verify that the <b>Business Unit</b> field displays "MDJUD" and the <b>Requisition ID</b> field displays "NEXT".
5.	Click the <b>Add</b> button. 

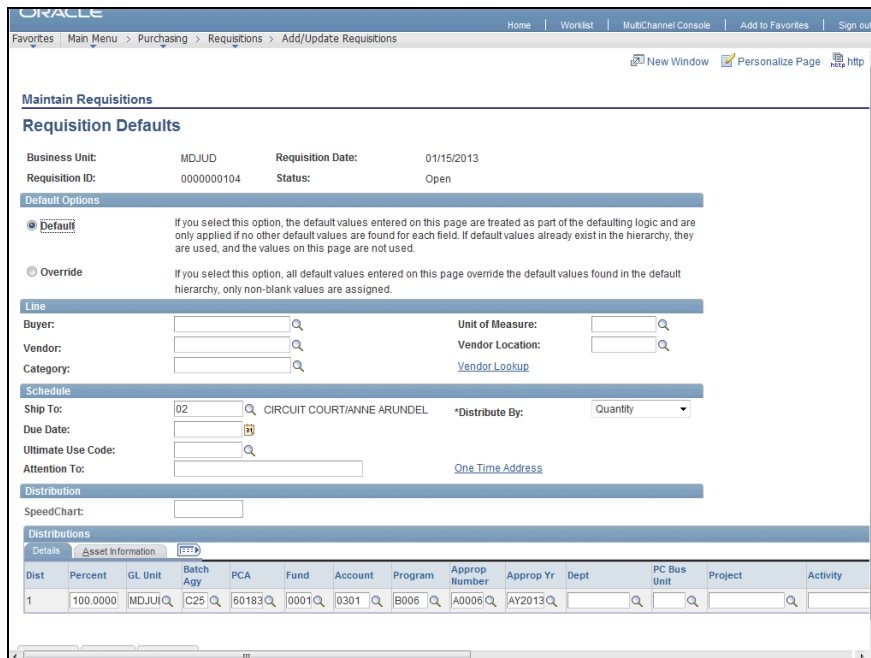





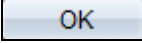

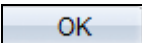
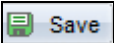


Step	Action
6.	The <b>Requisition</b> page displays.  Enter the desired information into the <b>Requisition Name</b> field, if desired.
7.	Click the <b>Look up Requester (Alt+5)</b> button. 



Step	Action
8.	The <b>Look Up Requester</b> page displays.  Click an appropriate requester link. 
9.	Enter the desired information into the <b>Item</b> field.
10.	Enter the line quantity into the <b>Quantity</b> field.
11.	<b>NOTE:</b> If the <b>Description</b> , <b>UOM</b> and <b>Category</b> fields are not already populated, they will be populated when you click the <b>Save</b> button.  Click the <b>Save</b> button. 
12.	Once you have entered information for one line, you can apply defaults for the requisition.  Click the <b>Requisition Defaults</b> link. 



Step	Action
13.	The <b>Requisition Defaults</b> page displays.  Use the <b>Requisition Defaults</b> to enter line, schedule, or distribution values that will be applied to the requisition.

Step	Action
14.	<p>In the <b>Default Options</b> section, use the Override option to override the default values entered in a field for the entries that you make on this page.</p> <p>Overrides only apply to the fields entered, i.e., only non-blank values are assigned on the requisition.</p> <p>Click the <b>Override</b> option.</p> 
15.	Enter line, schedule or distribution default values to apply to the requisition.
16.	<p>Click the <b>OK</b> button when you are finished.</p> 
17.	<p>The <b>Retrofit field changes</b> page displays.</p> <p>Values entered on the Requisition <b>Defaults</b> page are listed in the <b>Retrofit Field Selection</b> section.</p> <p>Review and confirm the values.</p>
18.	<p>Click the <b>Mark All</b> link to select all values you want to apply to the requisition.</p> 
19.	<p>The "Apply" check box is marked for all rows/values.</p> <p>Click the <b>OK</b> button.</p> 
20.	<p>The <b>Requisitions</b> page displays.</p> <p>Review line/schedule/distribution updates to verify that the defaults were applied, if desired.</p>
21.	<p>Click the <b>Save</b> button to save updates.</p> 
22.	<p>Click the <b>Approve</b> button.</p> 
23.	<p>The system changes the <b>Status</b> to "Approved".</p> <p>Click the <b>Budget Check</b> button.</p> 
24.	The <b>Budget Status</b> now "Valid",
25.	<p>You have successfully completed the <i>Applying Requisitions Defaults to a Requisition</i> topic.</p> <p>You have learned how to:</p> <ul style="list-style-type: none"> <li>- Apply defaults to a requisition</li> </ul> <p><b>End of Procedure.</b></p>

## Lesson 2: Canceling Requisitions

### Lesson Overview

There may be a need to cancel a requisition in ICFS. Once a requisition has been canceled, you can use the budget checking process to remove any pre-encumbered funds from the budget. This action releases the reserved funds so they can be used for other requests.

### Considerations

- If a requisition is sourced to an obligation, you must cancel the obligation before canceling the requisition.
- If a budget status of "Valid" exists on a requisition prior to cancellation, you must budget check the requisition to return committed funds to the funding source.
- If a requisition is canceled in error, you should create a new requisition.
- A cancelled requisition cannot be updated. It can be viewed from the **Requisition** inquiry pages after cancellation.

### Lesson Objectives

After completing this lesson, you will be able to:

- Cancel a requisition from the **Requisition** entry page
- Return funds to the funding source used on the cancelled requisition when necessary

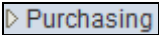


### 2.1 Canceling an Unsourced and Unapproved Requisition

After the completing this topic, you will be able to:

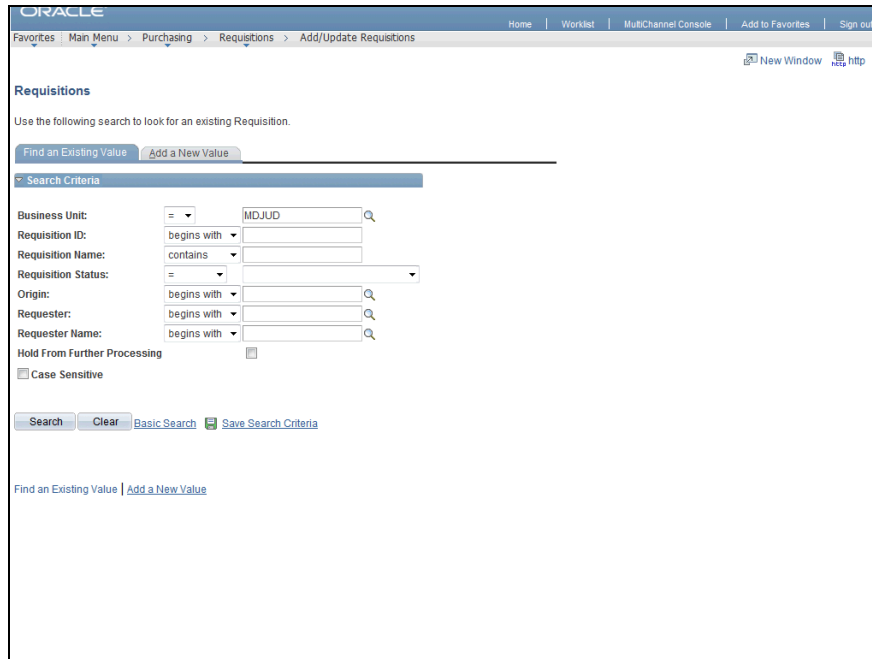
- Cancel a requisition that has not been approved or budget checked

### Procedure

In this topic, you will cancel an unsourced, unapproved requisition.

Step	Action
1.	Navigate to the <b>Requisitions</b> page.  Click the <b>Purchasing</b> link. 
2.	Click the <b>Requisitions</b> link. 
3.	Click the <b>Add/Update Requisitions</b> link. 

Step	Action
4.	<p>The <b>Requisitions</b> search page displays.</p> <p>Click the <b>Find an Existing Value</b> link.</p> <p><b>Find an Existing Value</b></p>



Step	Action
5.	<p>The <b>Requisitions - Find an Existing Value</b> page displays.</p> <p>You will need to search for a requisition that has already been created.</p> <p>Enter a valid value e.g. "<b>ptp</b>" into the <b>Requisition Name</b> field.</p>
6.	<p>Click the <b>Search</b> button.</p> <p><b>Search</b></p>

**Oracle**  
Favorites | Main Menu | Purchasing | Requisitions | Add/Update Requisitions

Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

New Window | http

### Requisitions

Use the following search to look for an existing Requisition.

Find an Existing Value | Add a New Value

**Search Criteria**

Business Unit: MDJUD  
 Requisition ID: begins with  
 Requisition Name: contains ptp  
 Requisition Status: =  
 Origin: begins with  
 Requester: begins with  
 Requester Name: begins with

Hold From Further Processing  
☐ Case Sensitive

Search | Clear | Basic Search | Save Search Criteria

Search (Alt+1)

View All | First | 1-10 of 10 | Last

Business Unit	Requisition ID	Requisition Name	Requisition Status	Origin	Requester	Requester Name	Hold From Further Processing
MDJUD	0000000095	PTP 1.1.1	Approved	ONL	tammy.sitar	Sitar, Tammy	N
MDJUD	0000000098	PTP 1.1.3	Approved	ONL	tammy.sitar	Sitar, Tammy	N
MDJUD	OPEN REQ	PTP 1.2.1	Open	ONL	wayne.wright	Wright, Wayne	N
MDJUD	BLD CHK	PTP 1.2.2	Approved	ONL	wayne.wright	Wright, Wayne	N
MDJUD	0000000102	PTP 2.1.3	Open	ONL	tammy.sitar	Sitar, Tammy	N
MDJUD	0000000094	PTP 2.2.1	Open	ONL	wayne.wright	Wright, Wayne	N
MDJUD	0000000082	PTP111RETESTOR	Approved	ONL	matt.mccaskey	McCaskey, Matt	N
MDJUD	0000000083	PTP112RETESTOR	Approved	ONL	matt.mccaskey	McCaskey, Matt	N
MDJUD	0000000084	PTP113RETESTOR	Approved	ONL	matt.mccaskey	McCaskey, Matt	N
MDJUD	0000000085	PTP114RETESTOR	Open	ONL	matt.mccaskey	McCaskey, Matt	N

Step	Action
7.	Click the appropriate link. In this example, <b>PTP.2.1.3</b> is selected, (this is the requisition created previously). <b>PTP.2.1.3</b>

**Oracle**  
Favorites | Main Menu | Purchasing | Requisitions | Add/Update Requisitions

Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

New Window | Personalize Page | http

### Maintain Requisitions

#### Requisition

Business Unit: MDJUD  
 Requisition ID: 0000000102  
 Requisition Name: PTP.2.1.3

Status: Open  
 Budget Status: Not Chk'd  
☐ Hold From Further Processing

\*Requester: tammy.sitar Sitar, Tammy  
 \*Requisition Date: 01/14/2013  
 Origin: ONL  
 \*Currency Code: USD Dollar  
 Accounting Date: 01/14/2013

Requisition Defaults  
 Add Comments  
 Requisition Activities  
 Document Status  
 Add Request Document

**Amount Summary**

Total Amount: 4,144.00 USD

Select Lines To Display

Line: To: Retrieve


Add Items From  
 Purchasing Kit  
 Item Search  
 Catalog  
 Requisition Items

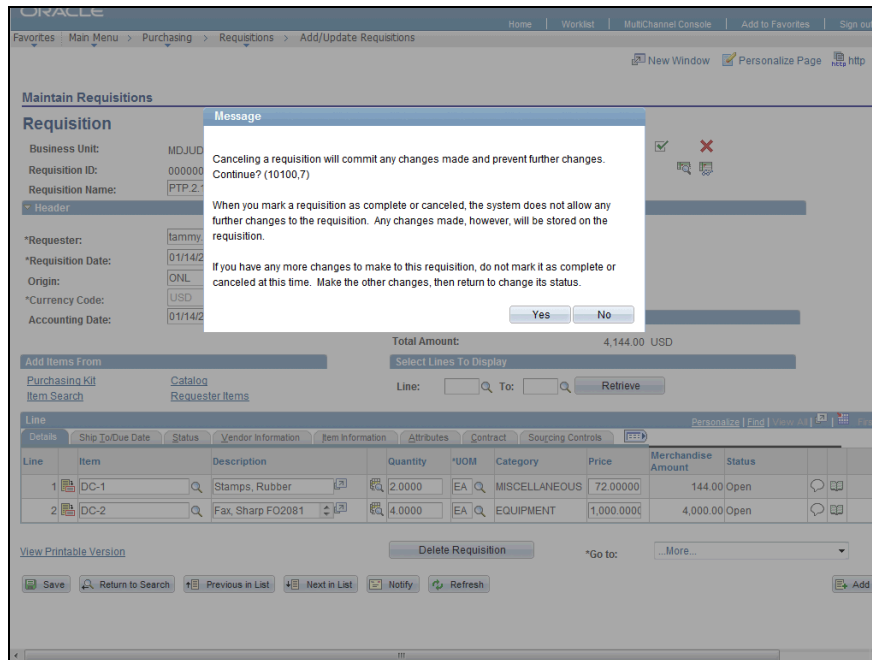
Details | Ship To/Due Date | Status | Vendor Information | Item Information | Attributes | Contract | Sourcing Controls

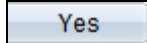
Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1	DC-1	Stamps, Rubber	2.0000	EA	MISCELLANEOUS	72.00000	144.00	Open
2	DC-2	Fax, Sharp FO2081	4.0000	EA	EQUIPMENT	1,000.0000	4,000.00	Open

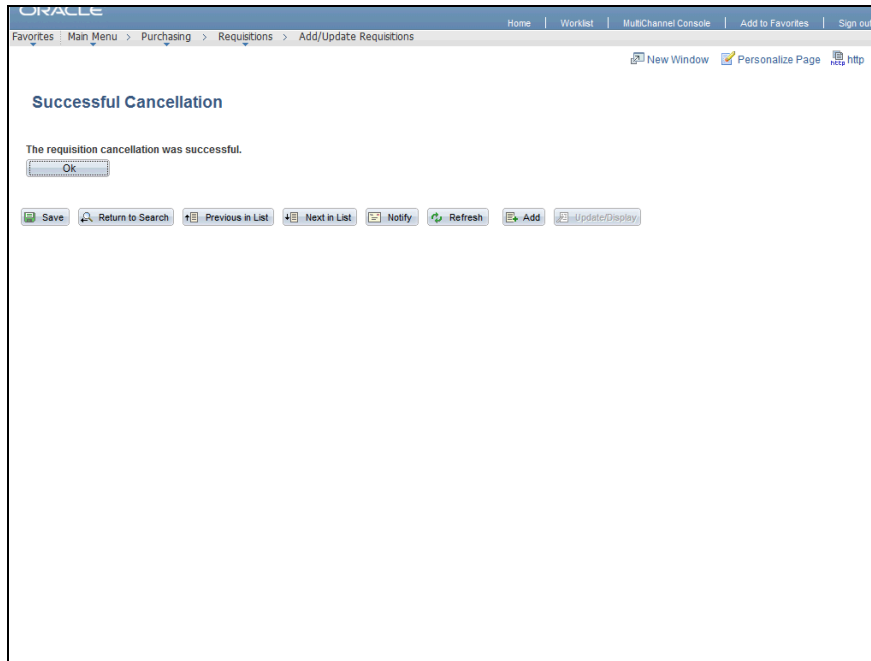
View Printable Version | Delete Requisition | \*Go to: More...

Save | Return to Search | Previous in List | Next in List | Notify | Refresh | Add

Step	Action
8.	<p>The <b>Requisitions - Maintain Requisitions</b> page displays.</p> <p>Verify that the Status of the selected requisition is "Open" and the Budget Status is "Not Chk'd" before proceeding to cancel it.</p>
9.	<p>Click the Cancel (red 'x') icon to cancel the requisition.</p> 



Step	Action
10.	<p>Review the message.</p> <p>Click the <b>Yes</b> button.</p> 



ORACLE

Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

Favorites | Main Menu > Purchasing > Requisitions > Add/Update Requisitions

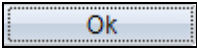
New Window Personalize Page http

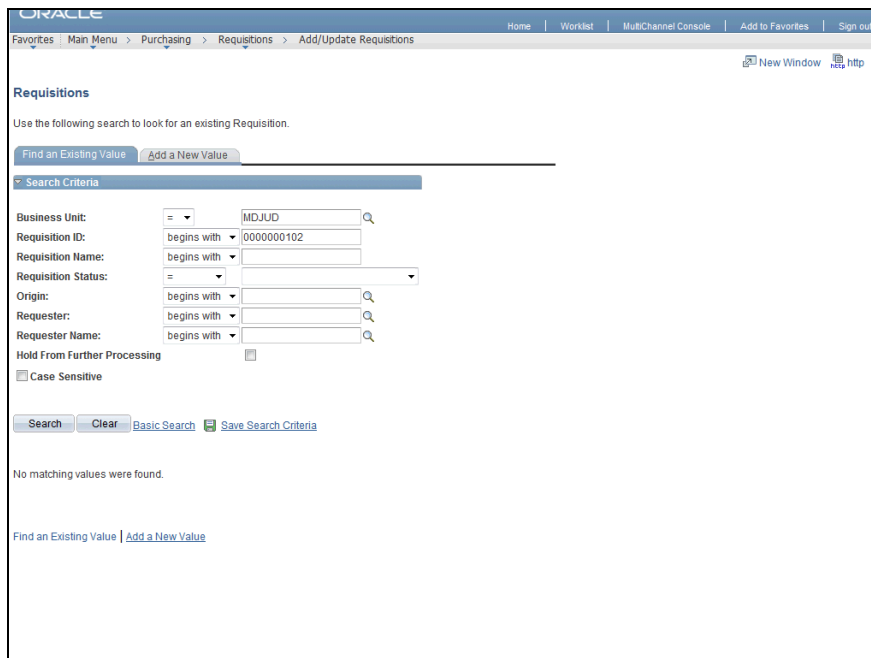
### Successful Cancellation

The requisition cancellation was successful.

Ok

Save Return to Search Previous in List Next in List Notify Refresh Add Update/Display

Step	Action
11.	<p>The <b>Successful Cancellation</b> page displays to confirm that the requisition was cancelled.</p> <p>Click the <b>Ok</b> button.</p> 



ORACLE

Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

Favorites | Main Menu > Purchasing > Requisitions > Add/Update Requisitions

New Window http

### Requisitions

Use the following search to look for an existing Requisition.

Find an Existing Value Add a New Value

Search Criteria

Business Unit: = MDJUD

Requisition ID: begins with 0000000102

Requisition Name: begins with

Requisition Status: =

Origin: begins with

Requester: begins with

Requester Name: begins with

Hold From Further Processing

Case Sensitive

Search Clear Basic Search Save Search Criteria

No matching values were found.

Find an Existing Value | Add a New Value



Step	Action
12.	<p>You have successfully completed the <i>Canceling an Unsourced and Unapproved Requisition</i> topic.</p> <p>You have learned how to:</p> <ul style="list-style-type: none"> <li>- Cancel an unsourced, unapproved requisition.</li> </ul> <p><b>End of Procedure.</b></p>

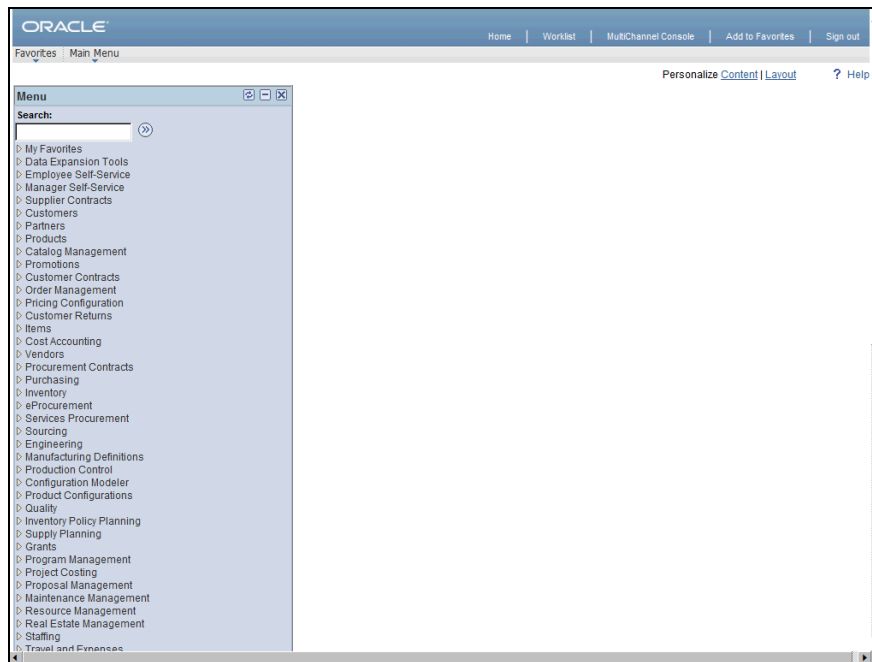
## 2.2 Canceling a Sourced Requisition


After completing this topic, you will be able to:

- Cancel a requisition that does not have an associated purchase order
- Return money to the budget after cancelation

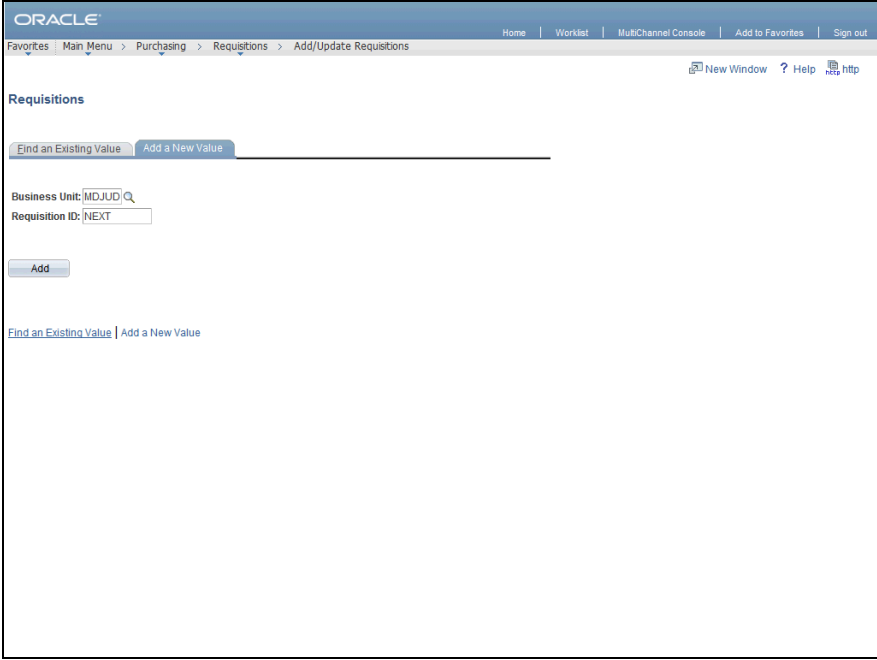
### Procedure

In this topic, you will cancel a requisition that was sourced to a PO, cancel the PO, and return money to the requisition.

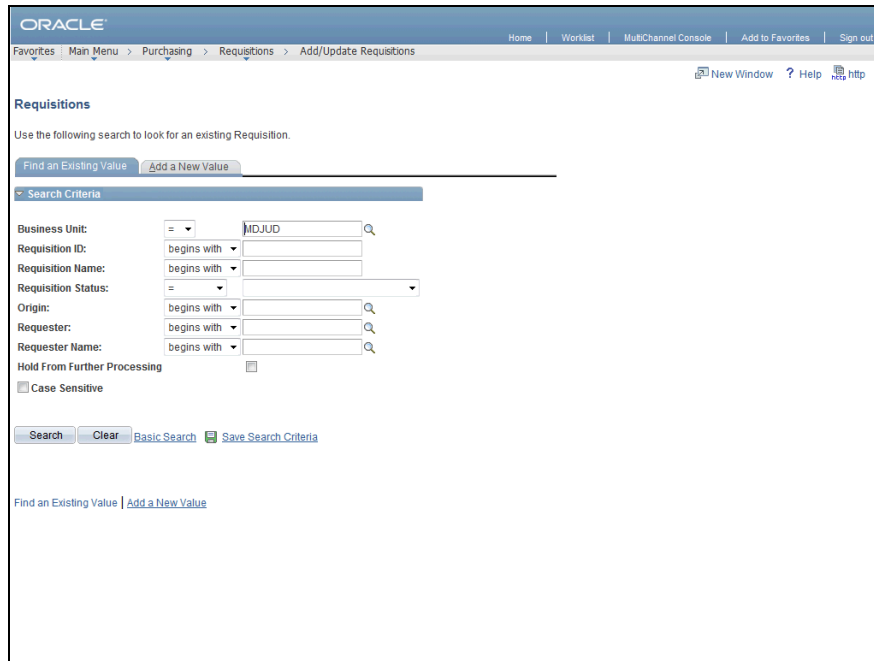


Step	Action
1.	<p>Navigate to the <b>Requisitions</b> page.</p> <p>Click the <b>Purchasing</b> link.</p> <p> <b>Purchasing</b></p>

Step	Action
2.	Click the <b>Add/Update Requisitions</b> link. <a href="#">Add/Update Requisitions</a>



Step	Action
3.	The <b>Requisitions</b> search page displays. Click the <b>Find an Existing Value</b> tab. <a href="#">Find an Existing Value</a>



ORACLE

Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

Favorites | Main Menu > Purchasing > Requisitions > Add/Update Requisitions

New Window ? Help http

### Requisitions

Use the following search to look for an existing Requisition.

Find an Existing Value | Add a New Value

Search Criteria

Business Unit: MDJUD

Requisition ID: begins with

Requisition Name: begins with

Requisition Status: =

Origin: begins with

Requester: begins with

Requester Name: begins with

Hold From Further Processing

Case Sensitive

Search Clear Basic Search Save Search Criteria

Find an Existing Value | Add a New Value

Step	Action
4.	<p>The <b>Find an Existing Value</b> page displays.</p> <p>Enter the desired information into the <b>Requisition ID</b> field.</p> <p>This should be the requisition created earlier in this topic, example: "<b>0000000055</b>".</p>
5.	<p>Click the <b>Search</b> button.</p> <p><b>Search</b></p>

ORACLE

Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

Favorites | Main Menu > Purchasing > Requisitions > Add/Update Requisitions

New Window ? Help Personalize Page http

### Maintain Requisitions

#### Requisition

Business Unit: MDJUD Status: Approved  
 Requisition ID: 0000000055 Budget Status: Valid  
 Requisition Name: 0000000055 ☐ Hold From Further Processing

**Header**

\*Requester: TAMMY SITAR Sitar, Tammy  
 \*Requisition Date: 12/12/2012 [Requester Info](#)  
 Origin: ONL Online  
 \*Currency Code: USD Dollar  
 Accounting Date: 12/12/2012

[Requisition Defaults](#)  
[Add Comments](#)  
[Requisition Activities](#)  
[Document Status](#)  
[Add Request Document](#)

**Amount Summary**

Total Amount: 1,000.00 USD  
 Pre-Encumbrance Balance: 1,000.00 USD

**Add Items From**

[Purchasing Kit](#) [Catalog](#)  
[Item Search](#) [Requester Items](#)

Select Lines To Display  
 Line:  To:  [Retrieve](#)


**Line**

Details | Ship To/Due Date | Status | Vendor Information | Item Information | Attributes | Contract | Sourcing Controls

Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1	CCDC/CR020	Property Received as	10.0000	EA	FORM	100.00000	1,000.00	Approved

[View Printable Version](#) \*Go to:

[Save](#) [Return to Search](#) [Notify](#) [Refresh](#) [Add](#)

Step	Action
6.	<p>The <b>Requisition</b> page displays.</p> <p>Click the <b>Cancel</b> button.</p> 

ORACLE

Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

Favorites | Main Menu > Purchasing > Requisitions > Add/Update Requisitions

New Window ? Help Personalize Page http

### Maintain Requisitions

#### Requisition

Business Unit: MDJUD Status: Approved  
 Requisition ID: 0000000055 Budget Status: Valid  
 Requisition Name: 0000000055 ☐ Hold From Further Processing

**Header**

\*Requester: TAMMY SITAR Sitar, Tammy  
 \*Requisition Date: 12/12/2012 [Requester Info](#)  
 Origin: ONL Online  
 \*Currency Code: USD Dollar  
 Accounting Date: 12/12/2012

[Requisition Defaults](#)  
[Add Comments](#)  
[Requisition Activities](#)  
[Document Status](#)  
[Add Request Document](#)

**Amount Summary**

Total Amount: 1,000.00 USD  
 Pre-Encumbrance Balance: 1,000.00 USD

**Add Items From**

[Purchasing Kit](#) [Catalog](#)  
[Item Search](#) [Requester Items](#)

Select Lines To Display  
 Line:  To:  [Retrieve](#)

**Line**

Details | Ship To/Due Date | Status | Vendor Information | Item Information | Attributes | Contract | Sourcing Controls

Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1	CCDC/CR020	Property Received as	10.0000	EA	FORM	100.00000	1,000.00	Approved

[View Printable Version](#) \*Go to:

[Save](#) [Return to Search](#) [Notify](#) [Refresh](#) [Add](#)

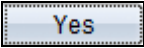
**Message**

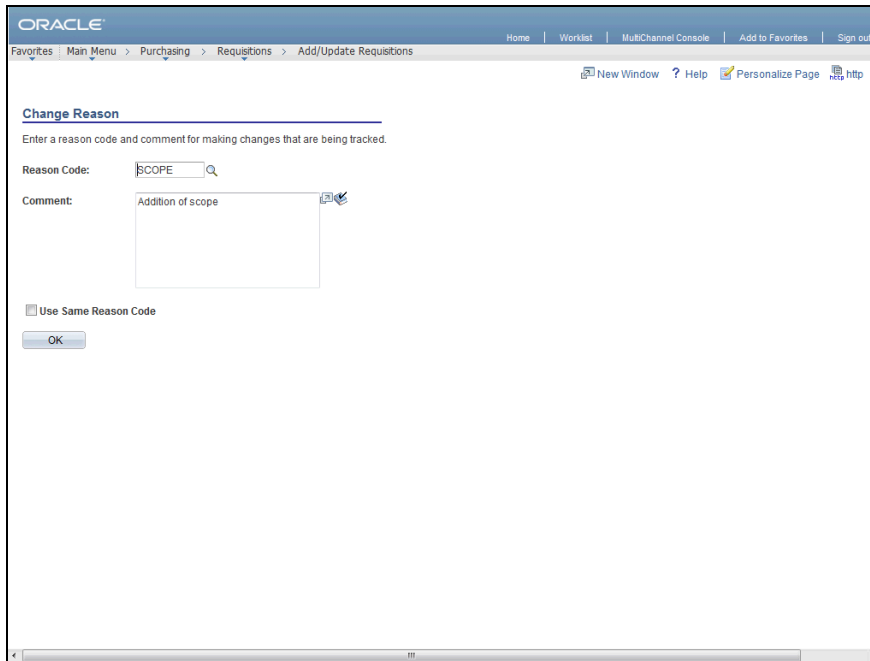
Canceling a requisition will commit any changes made and prevent further changes. Continue? (10100,7)

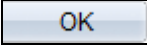
When you mark a requisition as complete or canceled, the system does not allow any further changes to the requisition. Any changes made, however, will be stored on the requisition.

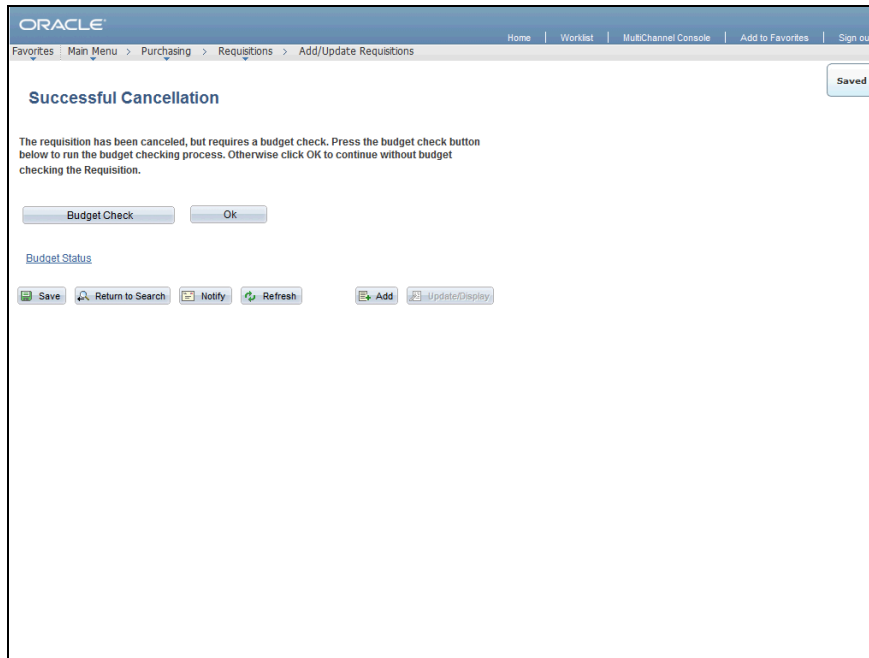
If you have any more changes to make to this requisition, do not mark it as complete or canceled at this time. Make the other changes, then return to change its status.

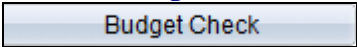
[Yes](#) [No](#)

Step	Action
7.	Click the <b>Yes</b> button. 



Step	Action
8.	<p>The <b>Change Reason</b> page displays.</p> <p>Enter a reason code into the reason code box and any explanatory comments that you want to make into the Comment box.</p> <p>Click the <b>OK</b> button. </p>



Step	Action
9.	<p>The <b>Successful Cancellation</b> page displays.</p> <p>A successful budget check returns the funds to the available budget.</p> <p>Click the <b>Budget Check</b> button.</p> 
10.	<p>You have successfully completed the <i>Canceling a Sourced Requisition</i> topic.</p> <p>You have learned how to:</p> <ul style="list-style-type: none"> <li>- Cancel a requisition after the associated purchase order had been cancelled or cancelled</li> <li>- Return pre-encumbered funds to the associated budget using the budget checking process</li> </ul> <p><b>End of Procedure.</b></p>



## 2.3 Canceling a Requisition Line

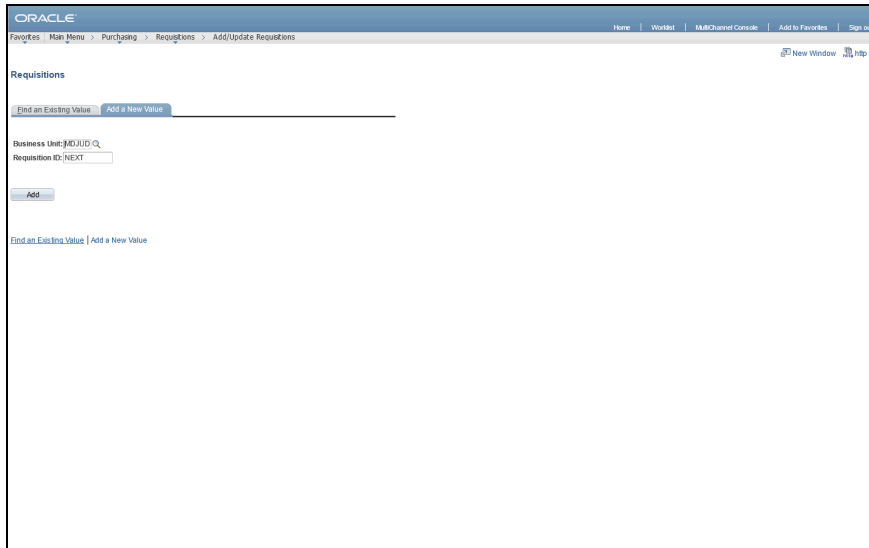
After completing this topic, you will be able to:

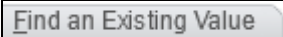
- Cancel a requisition line that has been budget checked
- Return money to the budget after cancellation

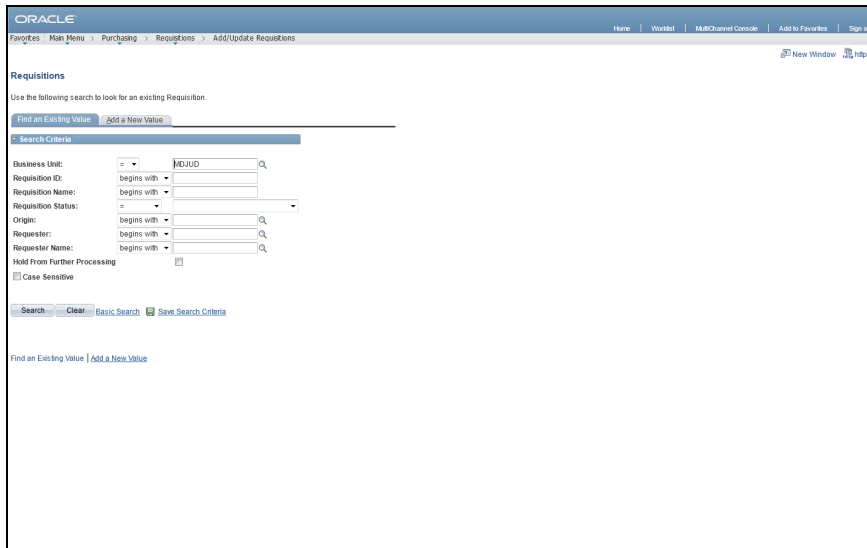
### Procedure

In this topic, you will cancel a requisition line that has not been sourced to a purchase order. You will also return pre-encumbered funds for the requisition line amount back to the associated budget.

Step	Action
1.	Navigate to the <b>Requisition</b> page.  Click the <b>Purchasing</b> link. 
2.	Click the <b>Add/Update Requisitions</b> link. 



Step	Action
3.	The <b>Requisitions</b> search page displays.  Click the <b>Find an Existing Value</b> tab. 



ORACLE  
Favorites Main Menu Purchasing Requisitions Add/Update Requisitions Home Worklist MyChannel Console Add to Favorites Sign out

New Window Help

### Requisitions

Use the following search to look for an existing Requisition.

Find an Existing Value Add a New Value

Search Criteria

Business Unit: MDJUD

Requisition ID: begins with

Requisition Name: begins with

Requisition Status: begins with

Origin: begins with

Requester: begins with

Requester Name: begins with

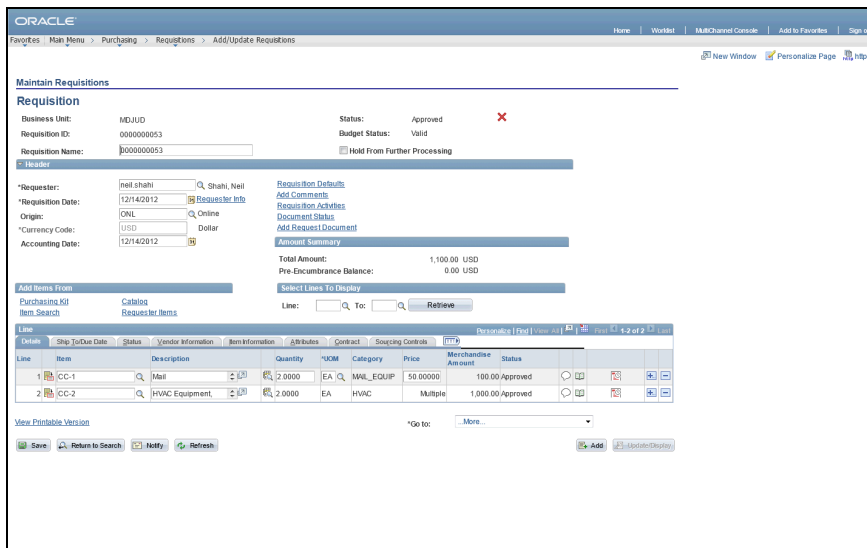
Hold From Further Processing

Case Sensitive

Search Clear Basic Search Save Search Criteria

Find an Existing Value Add a New Value

Step	Action
4.	<p>The <b>Find an Existing Value</b> tab displays.</p> <p>Enter the desired information into the <b>Requisition ID</b> field. Enter a previously created valid value e.g. "0000000053".</p>
5.	<p>Click the <b>Search</b> button.</p> <p><b>Note:</b> Once you enter the full Requisition ID above, you will be directed to the Requisition page for that req.</p> <p>Search</p>



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Favorites Main Menu Purchasing Requisitions Add/Update Requisitions Home Worklist MyChannel Console Add to Favorites Sign out

New Window Personalize Page Help

### Maintain Requisitions

Business Unit: MDJUD Status: Approved

Requisition ID: 0000000053 Budget Status: Valid

Requisition Name: 0000000053 Hold From Further Processing

Header

\*Requester: Neil Shahi

\*Requisition Date: 12/14/2012

\*Origin: ONL

\*Currency Code: USD

Accounting Date: 12/14/2012

Requisition Details

Add Comments

Requisition Activities

Document Status

Add Request Document

Amount Summary

Total Amount: 1,100.00 USD

Pre-Encumbrance Balance: 0.00 USD

Select Lines To Display

Line: To: Retrieve


Line	Item	Description	Quantity	UOM	Category	Price	Merchandise Amount	Status
1	CC-1	Isa	2.0000	EA	MNL_EQUIP	\$0.00000	100.00	Approved
2	CC-2	INVC Equipment	2.0000	EA	INVC	Multiple	1,000.00	Approved

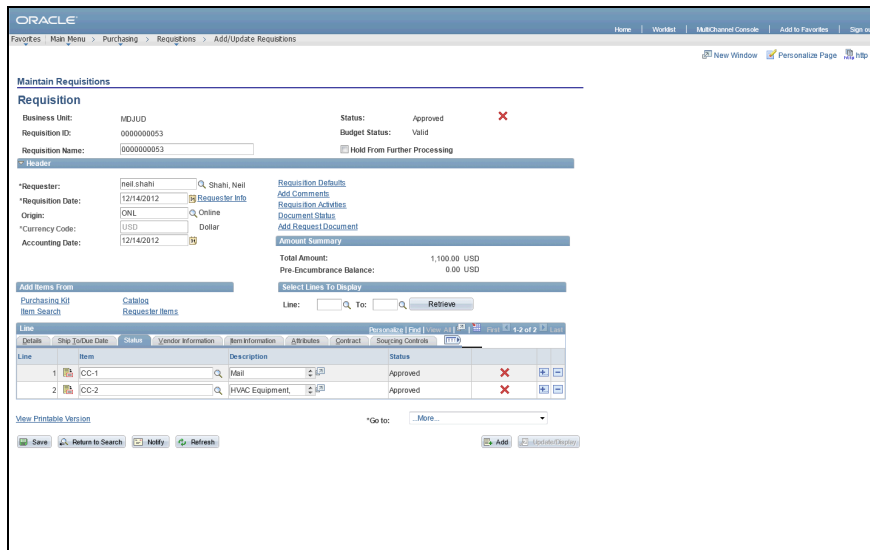
View Printable Version


Go to: More

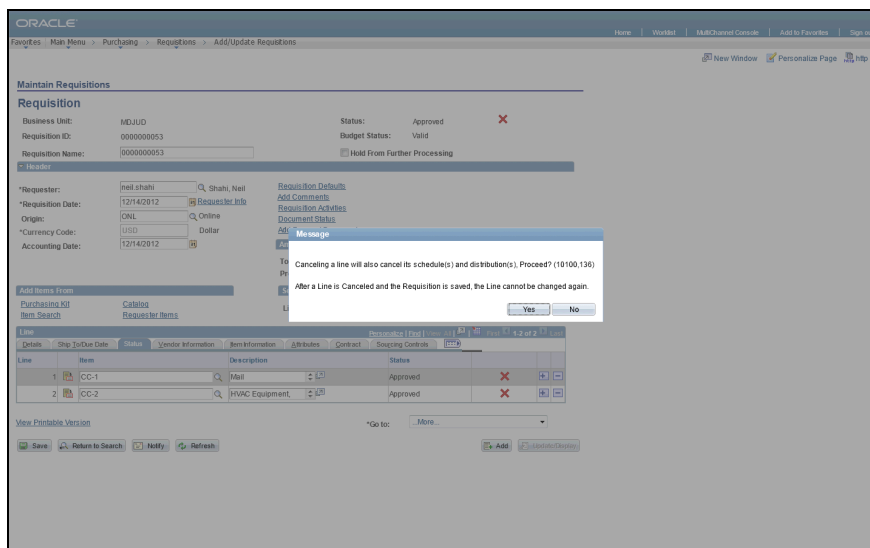
Save Return to Search Notify Refresh Add Update/Display






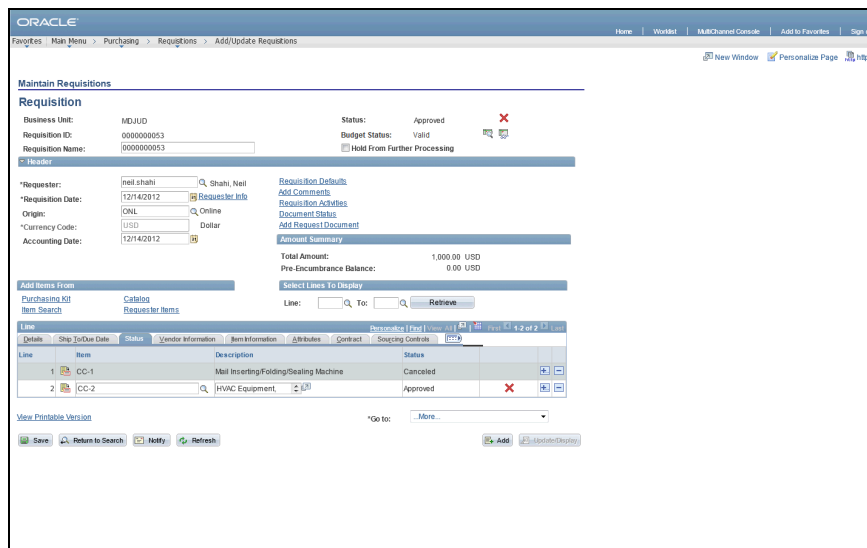
Step	Action
6.	<p>The <b>Requisition</b> page displays.</p> <p>Click the <b>Status</b> tab.</p> 



Step	Action
7.	<p>Click the <b>Cancel Line</b> button for Line 1.</p> 



Step	Action
8.	Click the <b>Yes</b> button. 
9.	Note: The status on the line that you canceled has changed to ' <b>Canceled</b> '.  Click the <b>Save</b> button. 
10.	Click the <b>Budget Check</b> button.  Validate Budget Status ='Valid' after the budget checking process has completed. 



Step	Action
11.	Verify that the Budget Status is <b>Valid</b> .
12.	You have successfully completed the <i>Canceling a Requisition Line</i> topic.  You have learned how to: - Cancel a req line <b>End of Procedure.</b>

## Lesson 3: Inquiring on Requisition Information

### Lesson Overview

In this lesson, you will review how to inquire on requisition information using the **Manage Requisitions** page.

### Lesson Objectives

After completing this lesson, you will be able to:

- View requisition information in GEARS
- Cross reference transactions associated with a requisition





### 3.1 Reviewing Requisition Information

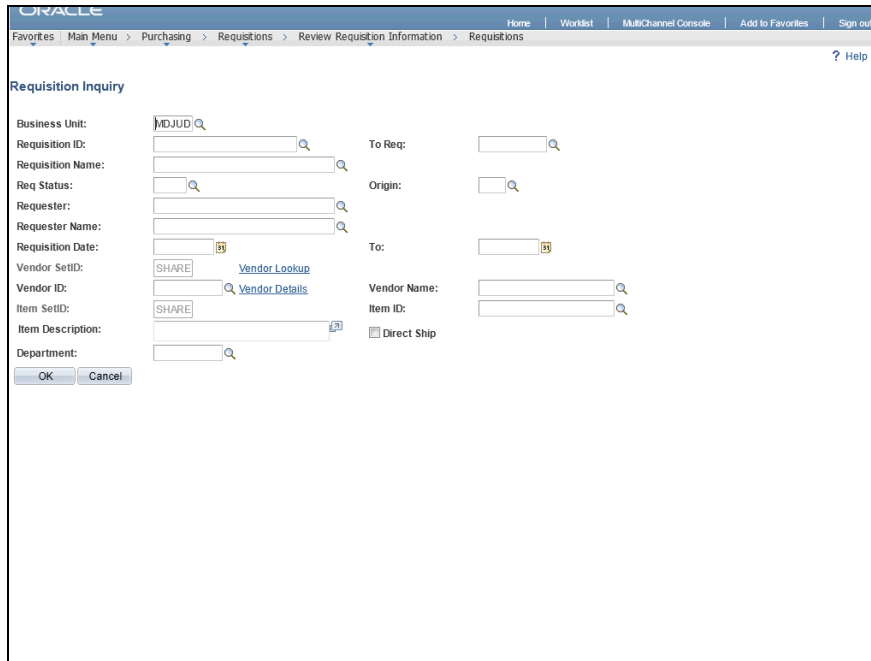
After completing this topic, you will be able to:


- Use search criteria to find an existing requisition
- View requisition information using the **Requisition** inquiry page

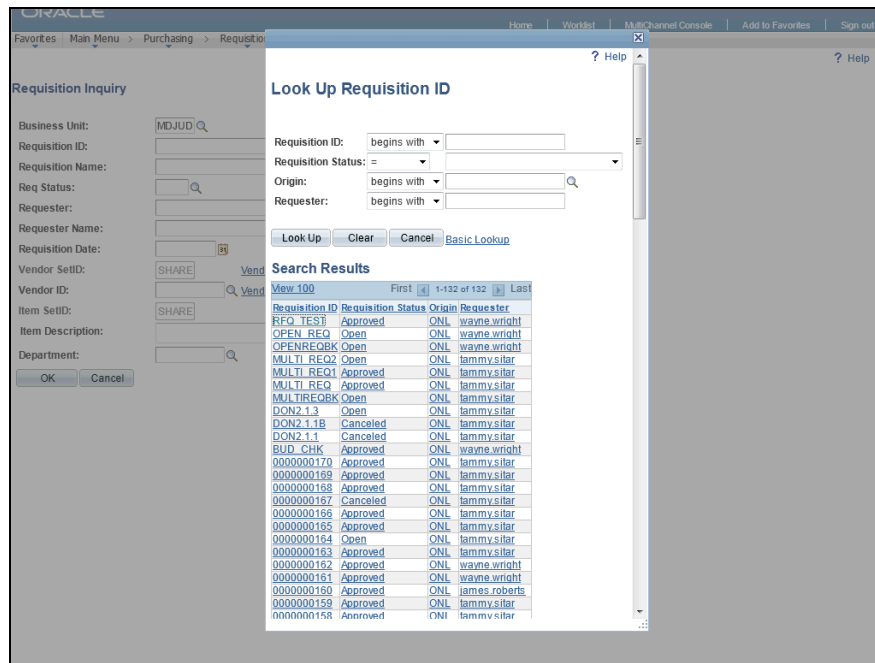
#### Procedure

In this topic, you will learn how to search for a requisition and review the associated information.

Step	Action
1.	Begin by navigating to the <b>Requisitions</b> page.  Click the <b>Purchasing</b> link. 
2.	Click the <b>Requisitions</b> link. 
3.	Click the <b>Review Requisition Information</b> link. 
4.	Click the <b>Requisitions</b> link. 



Step	Action
5.	<p>The <b>Requisition Inquiry</b> page displays.</p> <p>Various fields are available in which to conduct a search for a requisition. You can search by requisition name, by date, vendor, description, and by the ID. This page is used to enter the criteria needed to execute the search.</p>
6.	<p>For this example the criteria will be the <b>Requisition ID</b>.</p> <p>Click the <b>Look up Requisition ID (Alt+5)</b> button.</p> 



**Look Up Requisition ID**

Requisition ID: begins with

Requisition Status: =

Origin: begins with

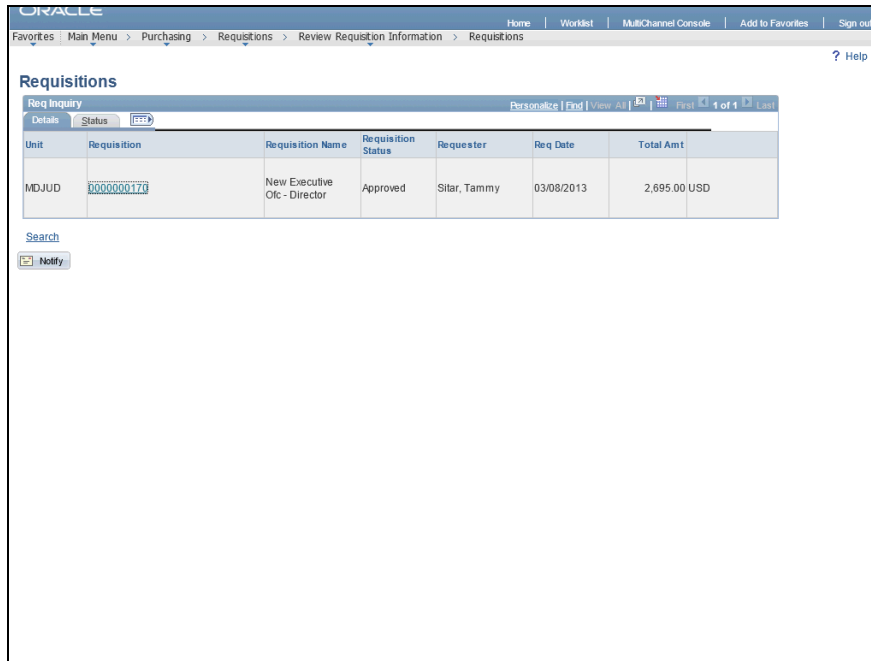
Requester: begins with

**Look Up** **Clear** **Cancel** [Basic Lookup](#)

**Search Results**

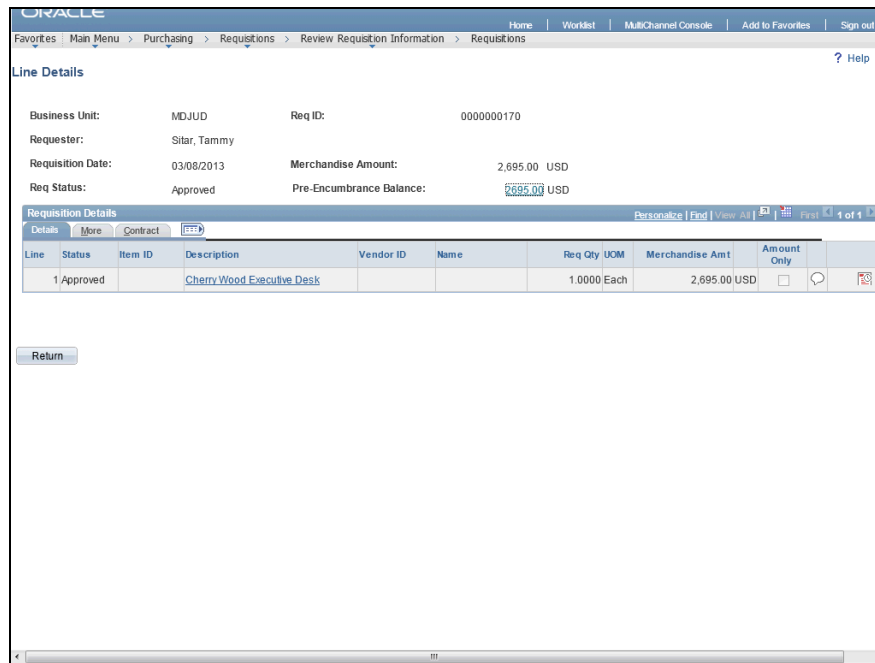
Requisition ID	Requisition Status	Origin	Requester
RFP TEST	Approved	ONL	wayne.wright
OPEN REQ	Open	ONL	wayne.wright
OPENREQBK	Open	ONL	wayne.wright
MULTI REQ2	Open	ONL	tammys.itar
MULTI REQ1	Approved	ONL	tammys.itar
MULTI REQ	Approved	ONL	tammys.itar
MULTIREQBK	Open	ONL	tammys.itar
DON2.1.3	Open	ONL	tammys.itar
DON2.1.18	Canceled	ONL	tammys.itar
DON2.1.1	Canceled	ONL	tammys.itar
BUD CHK	Approved	ONL	wayne.wright
0000000170	Approved	ONL	tammys.itar
0000000169	Approved	ONL	tammys.itar
0000000158	Approved	ONL	tammys.itar
0000000167	Canceled	ONL	tammys.itar
0000000166	Approved	ONL	tammys.itar
0000000165	Approved	ONL	tammys.itar
0000000164	Open	ONL	tammys.itar
0000000163	Approved	ONL	tammys.itar
0000000162	Approved	ONL	wayne.wright
0000000161	Approved	ONL	wayne.wright
0000000160	Approved	ONL	james.roberts
0000000159	Approved	ONL	tammys.itar
0000000158	Approved	ONL	tammys.itar


Step	Action
7.	<p>The <b>Look Up Requisition ID</b> page displays.</p> <p>If you know the <b>Requisition ID</b> enter</p> <p>Click the requisition ID link</p> <p><u>0000000170</u></p>
8.	<p>Click the <b>OK</b> button.</p> <p><b>OK</b></p>



Unit	Requisition	Requisition Name	Requisition Status	Requester	Req Date	Total Amt
MDJUD	<a href="#">0000000170</a>	New Executive Ofc - Director	Approved	Sitar, Tammy	03/08/2013	2,695.00 USD

Step	Action
9.	<p>The <b>Requisitions</b> page displays.</p> <p>The <b>Details</b> and the <b>Status</b> of the requisition can now be viewed.</p> <p>Take a moment to glance over the information on the <b>Details</b> tab. It provides basic information about the name of the requisition, who entered the request, the request date, and its current status.</p>
10.	<p>Click the <b>0000000170</b> link.</p> <p><a href="#">0000000170</a></p>



Step	Action
11.	<p>The <b>Line Details</b> of the requisition displays.</p> <p>It provides the quantity, amount for each line item, line item details, and the schedule details for the line item.</p>
12.	<p>To view the schedule information, click the <b>Schedule Details</b> button.</p> 

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Favorites | Main Menu > Purchasing > Requisitions > Review Requisition Information > Requisitions

? Help


**Schedule Details**

Business Unit: MDJUD Req ID: 0000000170 Line: 1

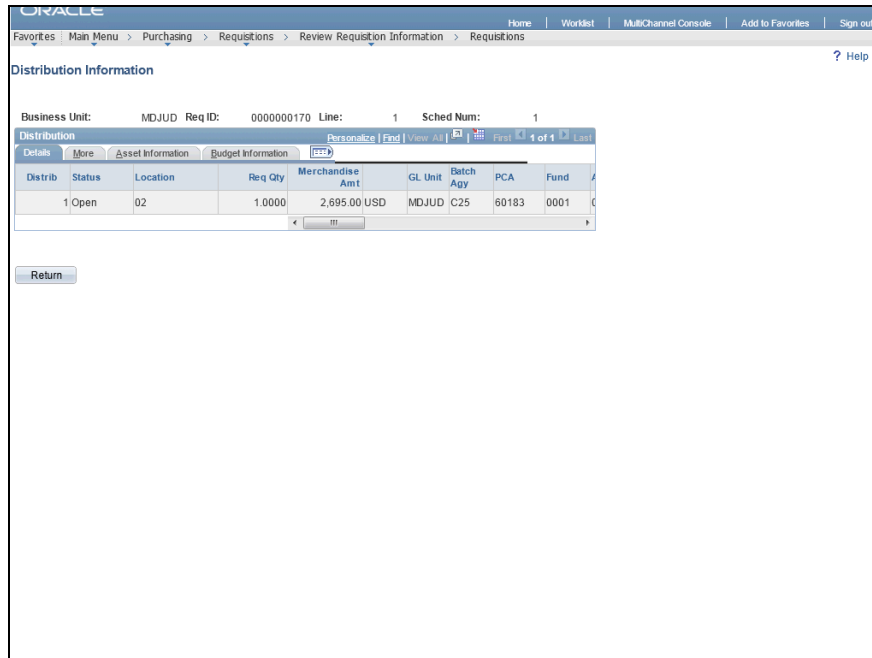
Sched	Status	Due Date	Ship To	One Time Addr	Price	Req Qty	Merchandise Amt	Revision
1	Active		12		2,695.00000	1.0000	2,695.00 USD	

Ship To Comments




[Return](#)

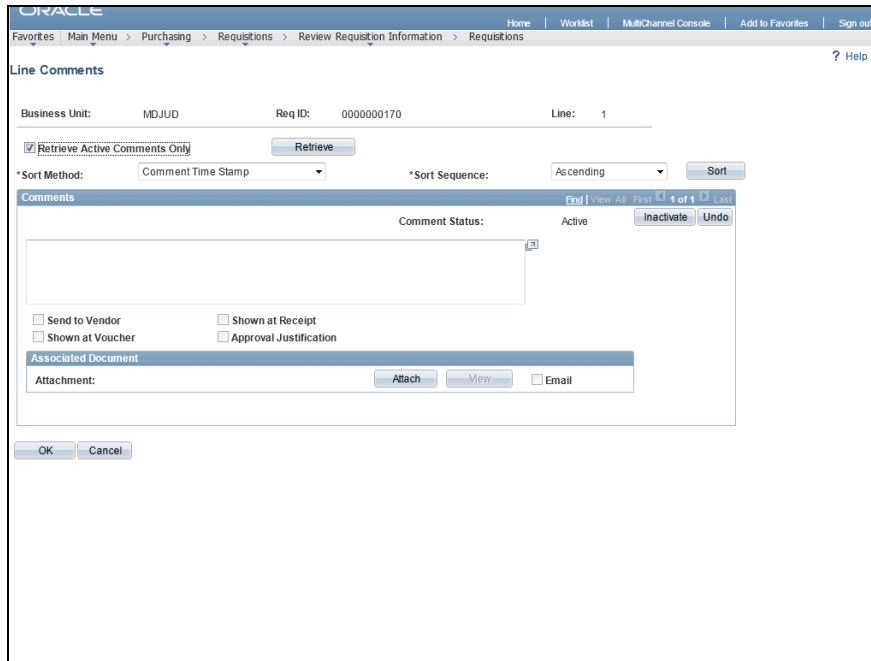
Step	Action
13.	<p>The <b>Schedule Details</b> page displays</p> <p>The location of where the item will ship to and the date it is due to arrive at the location can be viewed here.</p>
14.	<p>To view how the funds are distributed to pay for the line item,click the <b>Distribution Details</b> button.</p> 






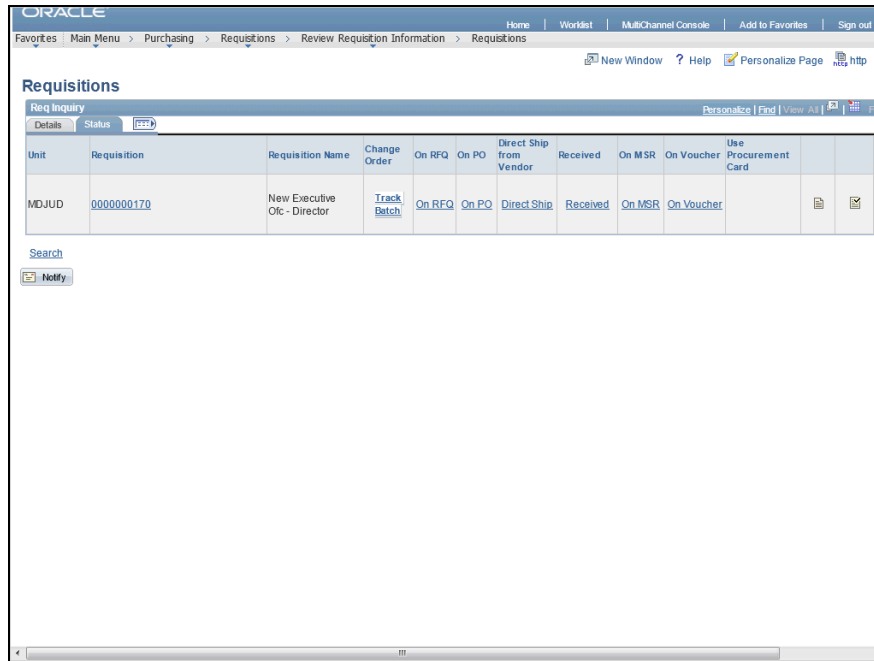


Business Unit: MDJUD Req ID: 0000000170 Line: 1 Sched Num: 1  
 Distribution Information  
 Details More Asset Information Budget Information  
 Distrib Status Location Req Qty Merchandise Amt GL Unit Batch Agy PCA Fund  
 1 Open 02 1.0000 2,695.00 USD MDJUD C25 60183 0001  
 Return

Step	Action
15.	<p>The <b>Distribution Details</b> page displays.</p> <p>The <b>Details</b> tab displays the funding information (i.e., PCA, Account and other Chartfield information) for the requisition line item.</p>
16.	Brief and general information, such as: Status, requisition quantity, and merchandise amount base, can be found in the <b>More</b> tab.
17.	Asset Management information such as the asset Profile ID and tag number (if applicable) display on the <b>Asset Information</b> tab.
18.	Review the date that the transaction was posted to the budget ledgers and view the requisition pre-encumbrance balance for the distribution line on the <b>Budget Information</b> tab.
19.	<p>When you are done viewing the details of the <b>Distribution Information</b> page, click the <b>Return</b> button.</p> <p></p>
20.	<p>The <b>Schedule Details</b> page displays.</p> <p>Click the <b>Return</b> button again to return to the <b>Line Details</b> page.</p> <p></p>
21.	<p>Comments are sometimes entered with the line item. To confirm if comments were entered for a specific line item, click the <b>Line Comments</b> button.</p> <p></p>




Step	Action
22.	The <b>Line Comments</b> page displays.  You can view comments OR attachments that have been added to the requisition.
23.	Click the <b>OK</b> button to return to the <b>Line Details</b> page. 
24.	Click the <b>Return</b> button to return to the <b>Requisitions</b> page. 
25.	To view the status information related to the requisition click the <b>Status</b> tab. 

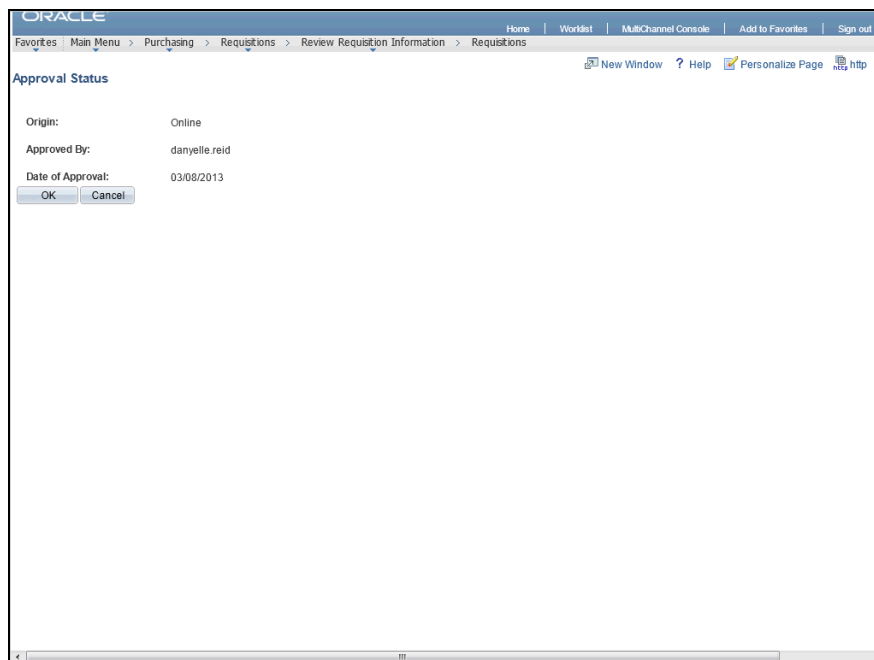


The screenshot shows the Oracle Requisitions page. The breadcrumb trail is: Favorites > Main Menu > Purchasing > Requisitions > Review Requisition Information > Requisitions. The page title is "Requisitions". Below the title, there are tabs for "Details" and "Status". The "Status" tab is selected. The table below shows the requisition details:

Unit	Requisition	Requisition Name	Change Order	On RFQ	On PO	Direct Ship from Vendor	Received	On MSR	On Voucher	Use Procurement Card		
MDJUD	0000000170	New Executive Ofc - Director	<a href="#">Track Batch</a>	On RFQ	On PO	Direct Ship	Received	On MSR	On Voucher			

Below the table, there are links for "Search" and "Notify".


Step	Action
26.	<p>Review the information displayed.</p> <p>When done, click the <b>Approval Status</b> button to view approval information.</p> 

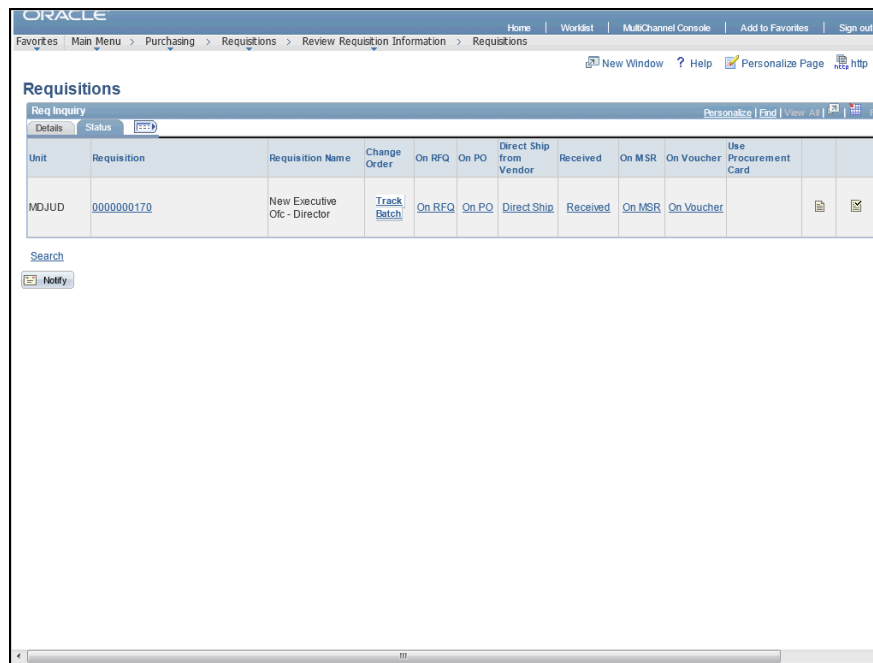



The screenshot shows the Oracle Approval Status dialog box. The breadcrumb trail is: Favorites > Main Menu > Purchasing > Requisitions > Review Requisition Information > Requisitions. The page title is "Approval Status". The dialog box contains the following information:

Origin: Online  
 Approved By: danyelle.reid  
 Date of Approval: 03/08/2013

At the bottom, there are "OK" and "Cancel" buttons.

Step	Action
27.	<p>Review the approver and the date of approval for the requisition.</p> <p>After reviewing the information, click the <b>OK</b> button.</p> 



Step	Action
28.	<p>The <b>Requisitions</b> page displays.</p> <p>To search for another requisition to review, click the <b>Search</b> link.</p> 
29.	<p>You have successfully completed the <i>Reviewing Requisition Information (Manage Requisitions Page)</i> topic.</p> <p>You have learned to:</p> <ul style="list-style-type: none"> <li>- search for a requisition</li> <li>- review the information associated to the requisition</li> </ul> <p><b>End of Procedure.</b></p>

## Course Summary



### **Congratulations!**

You have successfully completed the *PO230 Creating and Managing Requisitions in Purchasing* course. In this course, you have learned how to:

- Verify funds availability
- Enter requisitions for goods and services
- Commit funds to purchase by performing budget checking
- Monitor and manage budget exceptions
- Submit a requisition for approval
- Review requisition and related transaction information (i.e., purchase orders, receipts, vouchers, payments)

We hope that you found this class informative, interactive, and fun. Check out other GEARS training courses, available on the GEARS website at <http://courtnet/gears/index.html> (<http://courtnet/gears/index.html>).

We are always looking for opportunities to improve our courses. If you have ideas on improving this course please share your feedback by sending us an email at [gearstraining@mdcourts.gov](mailto:gearstraining@mdcourts.gov) (<mailto:gearstraining@mdcourts.gov>).